University of Alberta

Equity Among Equals: Sibling Views of Fairness in Parent Care and Parent Asset Distribution

by

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Abstract

Expectations for equity are everywhere. Yet in matters of caregiving within families, issues of equity, or fairness, have received limited attention. The focus has been on caregivers in relation to care recipients and has yielded little knowledge about caregivers in relation to each other. The purpose of this study was to increase understandings of caregiving sibling beliefs about equity by examining how the demands of care are distributed among siblings and how siblings view the fairness of this distribution. Siblings are prevalent as caregivers and share a distinctively equivalent status leaving them well suited to provide insight into caregiving equity.

Key assumptions from exchange theory were used to focus this study on comparisons of costs and rewards and resulting evaluations of fairness. Diverse sibling perspectives were collected from two distinct sources. Ten legal cases documents profiling disputes over the distribution of parent assets in relation to care that had been given were used as evidence of equity problems and to bring parent assets into focus as a caregiving reward. Qualitative interviews were also conducted with 11 siblings from 8 families to gather more detailed beliefs specific to standards for evaluating fairness in parent caregiving and asset distribution.

A content analysis of the legal documents and interview transcripts illuminated three themes of what siblings should contribute to parents needing care: doing what a family should, no priority among siblings, and the relevance of personal factors. Three themes of standards for evaluating caregiving fairness emerged: doing enough, working together, and lightening the load. Finally, three themes of how parent assets should be distributed were evident: beliefs in even shares, deservingness, and following parents'

wishes. Siblings' sense of their equivalence was central to their beliefs, as evident in legal data portrayals of siblings who were distressed that other siblings had assumed higher priority by being overinvolved in parent care and asset decisions. In the interview data this value on sibling equivalence was related to how care contributions were made rather than to the extent of contributions; contributions to parent care that validated other sibling contributions were important to views of equity.

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CHAPTER 1:

INTRODUCTION

Expectations for equity pervade our lives. Consciousness of fairness develops early and can be heard in plaintive protests of "No fair!" among preschool children. In these early years the foremost comparison is with other children within the same family. Issues of fairness permeate our lives from these intimate interactions to formalized mechanisms such as provincial mandates to educate every child, workplace equity policies, and the United Nations Declaration of Human Rights. Yet in matters of caregiving within families, issues of fairness can go unnoticed; family is regarded as a private haven (Jecker, 2002), and adults in families are assumed to have moved beyond the scorekeeping of childhood.

Extensive research has been conducted to learn about caregiving in terms of who provides care and at what cost. Many of these efforts have targeted caregiver/care recipient dyad relationships and have demonstrated that the majority of caregivers in these dyads are women. As well, studies have offered detailed accounts of the difficulties experienced by individual caregivers, such as stress, burden, and social isolation (e.g., Abel, 1991; Hequembourg & Brallier, 2005; Merrill, 1997). Some researchers have also targeted caregiving as a shared experience and provided insight into the composition of caregiving networks (Klein Ikkink, van Tilburg, & Knipscheer, 1999). Yet given our well-developed understanding of the issues that individual caregivers face, our recent consciousness of caregiving as shared, and our underlying awareness of the importance of fairness, surprisingly little is known about the process of distributing care responsibilities among family members and what these family caregivers believe about

the fairness of this distribution. Study of these issues will not only continue to move knowledge beyond ideas of families as havens where care is automatic, but also expand understandings of how groups of caregivers rather than individuals experience care demands.

Adult children have been described as a major caregiving group (Hooyman & Kiyak, 1999; Johnson, 2000), comprising 37% of all caregivers (Abel, 1991). Adult children feel a sense of responsibility for aging parents and are motivated to care by some combination of love, duty, and the desire to reciprocate for their upbringing (Aronson, 1990). These adult children are the same group who formulated understandings of fairness on the basis of sharing with each other in early life. Yet few studies have been focused on the sharing that occurs within groups of caregiving siblings. Instead, efforts to understand this group have followed the research tradition of distinguishing caregivers according to their relationship with the care recipients. We are left with little knowledge about how this very obligated caregiving group share care responsibilities and how equity is perceived in their adult lives, specifically in relation to parent care.

The purpose of this study was to increase understandings of caregiving groups through an examination of caregiving sibling beliefs about equity. To illuminate the issues of equity, a wide range of caregiving sibling perspectives was studied, including the perspectives of those who regarded their caregiving as fair as well as those who felt some resentment over how the caregiving tasks were distributed. More extreme perspectives of discord among siblings were also included by drawing on an unconventional source of data comprised of legal case documents. These documents provided judges' representations of equity disputes among siblings over the distribution

of parent assets in relation to the parent care that was given. Formalized disputes afford new insights into equity among caregiving groups because these disputes depict competing views of equity that have, to date, escaped the attention of researchers in their study of caregiving. Further, the legal case focus on parent asset distribution in relation to parent caregiving directs attention to a type of caregiving reward, parent assets, which have been infrequently discussed in the caregiving literature. Legal disputes are used here not only to provide one source of caregiving sibling perspectives on equity problems, but also to bring into focus parent assets as a caregiving reward. The views of parent assets as a reward are examined among siblings who engaged in legal disputes as well as among siblings not involved in legal disputes who either did not experience equity problems or who had equity problems that did not result in legal action.

Striving to understand equity means focusing on the group experience of caregiving; the spotlight is moved from caregivers as adult children in relationship with care recipients and onto caregivers as siblings in relationship with each other. Siblings comprise a prevalent group of caregivers who not only feel responsible for parent care, but also appear to approach their caregiving with expectations to share responsibilities and a longstanding inclination to look to each other to evaluate fairness. A small body of research has indicated that siblings are mindful of their equality in relation to parent care responsibilities. Siblings occupy positions of equal status derived from shared blood ties combined with shared history (Sandmaier, 1994). This equal status extends to expectations that parent care will be shared (Connidis, 2001; Ingersoll-Dayton, Neal, Ha, & Hammer, 2003; Merrill, 1997). Caregivers characterized by equal status offer a distinctly rich source of perspectives on caregiving equity and ultimately on caregiving

experienced by groups. Questions guiding this inquiry included the following: How is caregiving shared among siblings? How are parent assets shared among siblings, and, more specifically, is there a connection between giving care and receiving assets? What do siblings think about the fairness of their sharing? And on what bases do siblings evaluate the fairness of their sharing?

This dissertation is organized into seven chapters. Following this introductory chapter, Chapter 2 provides a theoretical framework for the study of equity among caregiving siblings. The framework is comprised of key assumptions and concepts from choice and exchange theory that have been productively applied to previous studies of how family responsibilities are divided. Concepts from research on shared caregiving are also included in the framework to provide a basis from which to begin to consider issues important to siblings who are evaluating fairness. In Chapter 3 a selective review of caregiving literature is offered, with a focus on what is known about sibling beliefs with respect to the fairness of sharing parent care, whether and how siblings behave in accordance with those beliefs, and how parent assets might be used to increase (or decrease) the sense of fairness.

Chapter 4 presents the method employed to gather and analyze sibling perspectives on equity in relation to parent care. The steps taken to interview 11 siblings from 8 families involved in parent care and to collect ten legal case documents that portray sibling disputes over parent assets in relation to parent care are detailed. The approach used to conduct a content analysis of interview transcripts and legal case documents is described.

The findings from the content analysis of sibling interview data are provided in Chapter 5. Family-by-family descriptions of sibling experiences with sharing parent care and parent assets are presented. These descriptions are followed by illustrations of themes from the data that pertain to sibling beliefs about what they should do for parents in need of care, how the fairness of their contributions is evaluated, and how parent assets should be distributed in light of how care is given.

In Chapter 6 a content analysis of legal case document data is provided. The similarities and differences between the legal case data and interview data are summarized, followed by a presentation of themes from the legal case data that are also present in the interview data. A discussion in Chapter 7 concludes this work with a consideration of how themes that emerged from the data—most notably, the impact of overinvolvement and the importance of validation—expand both empirical knowledge and theoretical understanding of equity among caregiving siblings. Steps for building on this study are suggested.

CHAPTER 2:

THEORETICAL FRAMEWORK

Choice and Exchange Theory: Assumptions and Concepts

The purpose of this study was to increase understandings of equity in caregiving families by examining sibling beliefs about the fairness of their sharing in relation to their aging parents. Choice and exchange theory, as it has been applied to family studies, provided the framework for this inquiry. Choice and exchange theory emphasizes evaluating one's situation in terms of costs and rewards through comparisons with the situations of others, and was used to focus this study on how equivalent group members evaluated the fairness of their respective caregiving contributions. Two basic assumptions of this theory are that people calculate costs and rewards in deciding how to act (White & Klein, 2002) and that people judge how well they are doing by comparing their own costs and rewards with the costs and rewards of others (Keith & Schafer, 1985).

Assumption 1: Calculating Costs and Rewards

In accordance with choice and exchange theory propositions, reward is defined as "anything perceived as beneficial to an actor's interests "while cost is" the inverse of reward" (White & Klein, 2002, p. 37). Using the assumption that people evaluate or judge fairness beginning with a calculation of costs and rewards (Heath, 1976), this study involved a focus on sibling calculations of caregiving costs and rewards in terms of how siblings perceived these to be distributed within the sibling group and how siblings evaluated these as costly or rewarding. Sibling calculations were considered in light of the adjunct concept of *evaluation standards*, which derives from the exchange theory assumption that standards used to evaluate costs and rewards differ between people

(Sabatelli & Shehan, 1993). The extent to which something is evaluated as costly or rewarding will depend on where it is placed in an individual's "hierarchy of values" (Nye, 1979). Assuming evaluation standards to be individualized, the individually defined qualities of particular costs and rewards and the resulting subtleties of evaluations of fairness were studied.

Costs to caregivers have been well documented. For example, in the large body of work on caregiver burden, direct links have been made between the provision of care tasks and emotional strain, employment accommodation, and social limitations (Scharlach, 1994; Strawbridge, Wallhagen, Shema, & Kaplan, 1997). Comparatively, rewards associated with giving care have been captured in a smaller body of research. This discussion has tended to emphasize rewards that are psychosocial in nature, such as pride in one's caregiving efforts or the benefits of companionship between caregivers and care recipients (Kramer, 1997).

Researchers have most often approached caregiving costs and rewards in terms of the dyadic relationship between caregiver and care recipient. Findings have centered on sibling evaluations of their individual costs and rewards rather than how these compare to costs and rewards of other siblings. A typical discussion of caregiving costs and rewards might be that although a caregiver incurs the cost of foregone social activities, she or he may experience the reward of satisfaction at knowing that the recipient's needs are met. In such instances, calculations of costs and rewards are based on what caregivers believe is deserved and/or realistically obtainable given previous experience with and understanding of their situation (Sabatelli & Shehan, 1993), in this case, experience and understanding of caregiving costs and rewards. This choice and exchange theory

assumption that people judge fairness through a calculation of their own costs and rewards, was used to direct attention to what siblings believed was deserved and/or obtainable in their caregiving situations. Further, the assumption that people judge fairness by comparing their own costs and rewards with those of others (Keith & Schafer, 1985) was used to direct attention to sibling evaluations of their caregiving costs and rewards relative to those of other siblings. A focus on comparisons was included towards expanding understanding of caregiving as a group experience.

Assumption 2: Comparing Costs and Rewards

Evidence that caregiving is considered costly (Abel, 1991; Hequembourg & Brallier, 2005) informed this examination in that siblings were expected to be keenly aware of how their contributions in this costly undertaking compare. Potential costs and rewards were chosen for study given their relevance to the shared experience of caregiving. A broad range of costs in the form of caregiving contributions was considered in the interest of learning how all siblings within a family share diverse tasks and compare their costs. Costs of care that were studied pertained not only to large, day-to-day contributions such as personal care, but also to relatively small or irregular care tasks such as occasional social visits. These costs were defined broadly as arising from a wide array of contributions to parent care and encompassed "emotional support, companionship, and all forms of instrumental assistance," including "help with yard work, transportation, the management of finances, as well as physical care" (Pyke, 1999, p. 663).

The potential rewards examined in this study were defined to include concrete rewards in the form of parent assets. These were studied for their relevance to the shared

experience of siblings given that siblings usually expect to share equally in parent assets (Finch, Hayes, Mason, Masson, & Wallis, 1996). At the same time, in some families, assets have been used to compensate one or more siblings for providing greater amounts of parent care (Hall, 2002a; Herd, 2002). This combination of ideas that assets should be shared evenly, yet may be used to reward caregiving, reflect competing conceptualizations of fairness described by choice and exchange theorists. Fairness may be judged according to what people have a right to receive such as siblings having a right to receive equal portions of parent assets. Alternatively (and in some cases simultaneously) fairness may be judged in terms of what people deserve such as a sibling receiving a larger portion of parent assets for providing a larger amount of care to the parent (Heath, 1976). Bringing these two concepts of fairness into view by studying how assets are shared among siblings in relation to how caregiving tasks were distributed afforded a vehicle for examining caregiving sibling beliefs about fairness in ways not previously considered.

In the interest of learning about what is considered when evaluating fairness, caregiving costs and rewards were examined in terms of actual costs incurred and rewards received as well as in terms of the process undertaken to determine how costs and rewards were distributed. In a study of how family members negotiated responsibilities, Finch and Mason (1993) drew a similar distinction as they delineated substantive factors as rules that set out what one should do compared to procedural factors, which are guidelines about how to work out what to do in a given set of circumstances. Distinguishing procedural factors was valuable for this study of beliefs about fairness within siblings groups as the need to work out how care will be given and

assets distributed is likely an important consideration for fairness when multiple potential caregivers/asset recipients are involved.

Comparing caregiving among responsible equals. The concepts of *filial responsibility* (Lewinter, 2003) and *genealogical equivalence* (Finch & Mason, 1990) together provided a further basis for examining how sibling caregivers compare their costs and rewards. These ideas have been shown to influence what siblings believe they should do for their parents and how they compare their respective contributions. Two decades ago, in a discussion of family responsibilities, Callahan (1985) claimed that "the emotional and biological bond between parent and child gives the relationship a permanent and central place in our lives quite apart from whether that relationship turns out well or poorly" (p. 35). According to Callahan, all children experience the centrality of this relationship and a corresponding sense of caregiving responsibility. This sense of responsibility has been described as filial responsibility and used to capture why siblings (adult children) provide care to aging parents (Finley, Roberts, & Banahan, 1988; Globerman, 1995; Lewinter, 2003). Globerman demonstrated the essence of filial responsibility through her findings that, although siblings within families behaved differently in relation to the care needs of their aging parents, all had a sense of *ownership* for caregiving. The current study was focused on how beliefs in filial responsibility were manifest as siblings compared their respective caregiving costs and rewards. Further, research findings indicate that because siblings occupy positions of equal status in families, they not only experience a sense of parent care responsibility, but also expect to share this responsibility with each other (Merrill, 1997). Siblings' shared status, which entails expectations for shared parent care responsibility, has been

described as genealogical equivalence (Finch & Mason, 1990). The current study included a focus on whether and how beliefs in genealogical equivalence were manifest in comparisons of costs and rewards.

Comparisons based on personal factors. Although siblings may expect to share caregiving responsibilities, they compare the adequacy and fairness of their respective involvement in parent care partly based on personal factors including personality, gender, other family responsibilities, employment status, and proximity to the care recipient (Ingersoll-Dayton et al., 2003). The idea of personal factors influencing expectations for contributions to parent care provided further focus to this study as sibling comparisons of costs and rewards and evaluations of fairness were examined for how personal factors were taken into account.

Balanced costs and rewards among responsible equals. The concept of balance, drawn from choice and exchange theory, provided focus for this study. Sibling assessments of their own costs and rewards were considered in terms of whether and how these reflected beliefs that levels of costs and rewards were balanced. Further, in accordance with the choice and exchange theory assumption that people use their calculations and comparisons of costs and rewards to seek relationships in which the parties each have a similar balance of costs and rewards, sibling assessments of fairness were studied in terms of how these evidenced beliefs that within siblings groups, each sibling had a similar cost/reward balance. Choice and exchange theorists have proposed that inequity over imbalances causes distress in the form of resentment and anger for the underbenefited and guilt for the overbenefited (Walster, Walster, & Berscheid, 1978; White & Klein, 2002) and, further, that distress over inequity prompts steps to restore or

achieve equity (Walster et al., 1978). Siblings' experiences with perceived imbalances or inequities were central to this study, and such perceptions were sought in the expectation that underlying beliefs about equity would be more apparent when violated. Further, this choice and exchange theory assumption directed attention not only to experiences with inequity, but also to efforts to achieve equity in the interest of gaining insight into what leads to unfairness and, in light of this, what would be required to increase fairness.

The exchange theory assumption that inequity causes distress has been supported in studies of caregiving siblings. The findings reveal distress among sibling caregivers because some siblings contributed insufficient amounts of care (Strawbridge et al., 1997). Perceived imbalances may result in conflict (Wolfson, Handfield-Jones, Glass, McClaran, & Keyserlingk, 1993) and efforts to achieve equity initiated by the more involved siblings (Ingersoll-Dayton et al., 2003)

Conversely, siblings have been shown to take formal steps to increase equity in situations in which they claim that other siblings were overinvolved in decisions on parent care and parent assets. These attempts to increase equity have been expressed legally through the concept of undue influence which entails a claim that among siblings, there was an imbalance of influence over parent decisions (e.g., *Tracy v. Boles,* 1996; *Simpson* v. *Simpson,* 1997). In such cases one or more siblings claimed that one or more other siblings unduly influenced a parent. Undue influence claims may take two forms: A caregiving sibling may be accused of intentional undue influence that involves the intent to exploit the parent through tactics such as persuasion, harassment, or threats. Alternatively, undue influence may be unintentional and arise from the potential for domination inherent in a relationship. For example one party may have less power owing

to a "psychological and/or physical dependency (as where, for example, an older mother relies on her adult son to organize her affairs and deal with the 'outside world')" (Hall, 2005, p. 330). Although sibling concerns with imbalance in what they present as the overinvolvement of other siblings in issues of parent care and assets are depicted in legal documents, such concerns have received only passing notice in studies of shared caregiving (e.g., Merrill, 1997).

A Theoretical Framework for Further Understanding Fairness Among Caregiving Siblings

A framework for this study of caregiving sibling beliefs about fairness was developed by drawing upon exchange theory assumptions and concepts and combining these with concepts from the literature on caregiving groups. Providing care to aging parents was viewed as a situation where siblings evaluate the fairness of their caregiving by calculating their own costs and rewards and comparing these to the costs and rewards of siblings. Caregiving concepts of filial responsibility, genealogical equivalence and the relevance of personal factors provided foundation for this framework given previous findings about the importance of these concepts to sibling assessments of fairness. Siblings were expected to evaluate caregiving fairness in terms of filial responsibility given their positions as adult children, and genealogical equivalence given their equal status with each other. They were expected to take individual personal factors into account and judge fairness in terms of the balance of each individual's costs and rewards and the comparative costs and rewards within the sibling group.

CHAPTER 3:

LITERATURE REVIEW

The literature review highlights the current state of knowledge about how siblings calculate and compare the costs and rewards of parent caregiving and what these calculations and comparisons mean in terms of evaluations of fairness. The review begins with a presentation of what studies have shown about how standards for calculating care contributions can differ among siblings. Research evidence of sibling beliefs about how costly care is considered to be and how siblings compare their eligibility for assuming these costs is offered, followed by evidence of sibling behaviors in relation to assuming costs. The findings specific to how siblings compare their diverse contributions to parent care are then summarized. Evidence of the principles of filial responsibility and genealogical equivalence and considerations of personal factors are incorporated for their relevance as standards for comparing contributions and evaluating fairness. Given that one of the ways that equity among caregiving siblings is being considered is through the study of sibling views about sharing a particular reward, parent assets, the closing portion of the literature review pertains to the findings on the phenomenon of care agreements. Care agreements are meant to address the need for caregiving equity because they entail using parent assets to compensate siblings for their greater contributions to parent care. Evidence of disputes about fairness that occur in the context of care agreements is presented. The literature review concludes with a description of gaps in our understanding of fairness among caregiving siblings and the claim that studying sibling experiences with caregiving inequities, including inequities related to parent asset distribution, will take steps to address these gaps.

Background: Caregiving Siblings' Evaluation of Fairness

Relatively little is known about siblings' evaluation of the fairness of their caregiving. Caregiving studies have emphasized the individual caregiver/care recipient dyad (Connidis, 2001; Hequembourg & Brallier, 2005; Neuharth & Stern, 2000). One main caregiver, variously termed *focal* (Lee & Netzer, 1994), *principal* (Brody, 1990) or *primary*, tends to be identified and discussed. In other instances, particular family members have been described as assuming "the role of caregiver" (Stephens & Franks, 1999, 346), which also implies primary status. Even when multiple adult children are responsible for providing parent care, a tradition of focus on primary caregivers has inclined attention away from issues within sibling groups (Neuharth & Stern, 2000).

It has been noted that some researchers have accounted for sibling groups by representing siblings in terms of their presence or absence without examining how multiple siblings actually manage parent care (Merrill, 1997). In a discussion paper aimed at developing a model of family caregiving that accounts for patterns of which family members provide which types of care, Pezzin, Pollak, and Schone (2003) contended that most studies have focused on one caregiving child with other family members represented by summaries of the remaining network in terms of characteristics such as age and gender configuration. Consequently, the experiences of sibling caregiving groups, including how they go about comparing and evaluating the fairness of their caregiving, are largely unknown.

Calculations of Costs and Rewards Differ Among Siblings

Caregiving researchers who have considered how siblings calculate the costs and rewards of parent care have shown that, consistent with equity theory propositions,

standards of evaluation vary among siblings in terms of both perceived care task contributions and interpretations of the meanings of contributions.

Lerner, Somers, Reid, Chiriboga, and Tierney (1991) interviewed 140 pairs of siblings who were providing parent care about their views of their own and their siblings' contributions to the care. The participants tended to perceive their siblings as contributing less to parent care than they are themselves. They also saw their siblings as gaining less satisfaction from parent care tasks. Matthews (1995) added support for the idea that evaluations of contributions differ among siblings in her study of the perceptions of 50 sister-brother pairs who were providing parent care. The results indicate that whereas the pairs generally agreed on the facts of who made what contributions, their interpretations of the meaning of the contributions often differed.

Further, based on interviews with 149 pairs of siblings who provided various levels and types of support to parents, Matthews (2002) found that brothers and sisters presented distinct ideas about what types of care task contributions counted in calculations of how to meet their parents' needs. These gendered approaches to "best practices" were described as brothers being inclined to respond to parent requests for help, whereas sisters tended to "monitor" parent needs. It was further submitted that brothers are more inclined to strive for an egalitarian relationship with parents by maintaining the parents' self-sufficiency (Matthews, 2002). In an earlier study based on interviews with 50 brother-sister pairs, Matthews (1995) also found that, regardless of the level of care that parents required, both brothers and sisters tended to view the tasks performed by the brothers, such as visiting and financial management, as less important than the tasks performed by the sisters.

As well as showing that calculations of the adequacy of contributions may vary among siblings, research on siblings who are providing parent care has offered some evidence of consistent dimensions in comparing the respective care contributions within sibling groups. The principles of filial responsibility and genealogical equivalence as well as the influence of personal factors feature in sibling comparisons and have been reflected in the belief that fairness in parent care requires a sharing of responsibility among siblings, but not necessarily an even sharing of care tasks.

Siblings Comparing Costs of Caregiving:

Filial Responsibility

The findings on the concept of filial responsibility suggest that adult children regard parent care as an expected life event and, further, may compare their respective caregiving contributions with the expectation that all siblings will adhere to norms of filial responsibility. Based on a review of the literature on patterns of intergenerational assistance, Hooyman and Kiyak (1999) concluded that parent care is "a predictable and nearly universal experience across the life course" (p. 259). All adult children, given their shared genetic heritage (Cicirelli, 1982), can be expected to have a sense of responsibility for parent care. Caregiving researchers have offered findings that support filial responsibility as a motivator of parent care. In a study of reciprocity in caregiving relationships based on interviews with 167 home-help recipients, their informal caregivers, and their paid home helpers, Lewinter (2003) illustrated the influence of filial responsibility. A caregiving daughter, describing why she provided care, stated simply, "You do it because it is your father, right?" (p. 368).

Support for the influence of filial responsibility was evident in a study of 170 adult children about their perceptions of responsibility for providing care to dependent elderly parents (Wolfson et al., 1993). All participants had an elderly parent who was an in-patient in a hospital, although the participants were not necessarily the caregiver or potential caregiver for the parent. They were interviewed regarding their beliefs about what adult children should do in relation to hypothetical parents in need of care depicted in a series of vignettes. A distinction was made between what adult children "should" do for parents in terms of emotional, physical, and financial support and what they "could" do. Although some variations were evident, the interview data revealed evidence of the influence of filial responsibility on beliefs about what children should or could do for parents in need of care; the researchers declared, "All scores were high" (p. 315).

In their interviews with 50 pairs of caregiving sisters, Matthews and Rosner (1988) also captured expectations that all siblings would adhere to norms of filial responsibility. In families with three sisters in which one sister had dissociated herself from parent care, the sisters who were giving care "either expressed anger or offered an elaborate explanation for her nonparticipation" (p. 190).

Comparing Costs of Care Among the Filially Responsible: Genealogical Equivalence

Siblings compare their costs of parent care with the view that adult children have a responsibility for care and, further, that the costs or tasks associated with this responsibility should be shared among the siblings. Studies have indicated that siblings are usually willing and able to share care tasks and that sharing offers benefits in terms of

both the level of burden experienced by individual siblings and the quality of relationships among the siblings.

More than 15 years ago Finch and Mason (1990) found that a variety of family members, including parents, children, grandchildren, and siblings, believed that the burden of parent care "should be shared equitably, if not equally, between all those in an equivalent genealogical position" (p. 169). Cicirelli (1995) supported the idea of genealogical equivalence through a summary and integration of research findings about siblings across the lifespan. Therein Cicirelli proclaimed the fundamental egalitarian nature of sibling relationships and concluded that despite differences in features such as age, gender, and levels of accomplishment, siblings tend to relate as equals.

Merrill (1997) used the idea that the responsibility for parent care should be shared among siblings and based her study of how sharing occurs between adult children on the assumption that siblings expect to share parent caregiving and to be relatively comfortable in this sharing given that it occurs with family members of equal status. Cicirelli (1992) reinforced this idea with his findings that most sibling groups feel that they can work together to provide care for parents. In his sample of 62 caregivers, a small majority (57%) said that they could work together very well, and a further one quarter felt that they could work together to some degree.

The belief that parent care should be shared was evident in a study of caregivers' views of their own and their siblings' contributions to the care of their parents (Lerner et al., 1991). Using interview data from 140 pairs of caregiving siblings, these researchers concluded that the greater the participation of siblings in meeting parents' needs, the less pressure there is for each to contribute. Similarly, based on a study that involved

interviews with 50 pairs of caregiving sisters about how parent care needs are met, Matthews and Sprey (1989) observed that when one sibling, for whatever reason, does a given job, others are excused from doing it.

Sibling expectations for sharing parent care were further illustrated in a study of perceptions and interactions of caregiving daughters and their local siblings. Interview data from 100 caregiving daughters/local sibling pairs evidenced the significance of sibling relationships in caregiving, which revealed the belief that sibling support for caregivers is important, whereas a lack of sibling support leads to distress (Brody, Hoffman, Kleban, & Schoonover, 1989).

An added dimension of sibling expectations for shared parent care was highlighted in an examination of the meaning of family responsibility to older members through interviews with 43 members from two or three generations within 15 families (Piercy, 1998). These data indicate that family responsibilities include responsibility not only to the older person, but also to other family members. For example, a sibling may provide care to a parent not simply to meet the needs of the parent, but also to alleviate other siblings' concerns with meeting the parent's needs (Piercy, 1998). Similarly, in a discussion of sibling relationships across the lifespan, Cicirelli (1995) claimed that siblings coordinate parent care out of attachment to the parent as well as out of attachment to each other.

A further example highlights the impact of beliefs that parent care should be shared on sibling relationships. In a study of 30 caregiving sons of parents with Alzheimer's disease, the relevance of sibling dynamics in relation to parent care was illustrated in the finding that only 3 of 30 caregiver participants reported that sibling

relationships were unaffected by the experience of parent care (Harris, 1998). In some instances tensions arose in relation to refusal to accept responsibility on the parts of some siblings, whereas in other instances the parent illness brought the siblings closer together. In either case, parent care was a sibling experience.

Sibling Behaviors Relative to Expectations for Shared Caregiving

The findings on sibling beliefs that parent care should be shared are consistent with the findings on what may be termed procedural aspects of caregiving behavior. Procedural aspects pertain to how the provision of care is determined, and the findings indicate that processes are undertaken to determine who will do what, which suggests that all siblings are eligible to care. For example, care coordination efforts were undertaken by three quarters of siblings who were interviewed to learn to what extent siblings work together to help parents (Cicirelli, 1992). In half of the families of the 62 caregivers interviewed, all siblings coordinated caregiving efforts; and in one quarter of the families there was partial coordination by siblings. In the remaining quarter of the families, each sibling helped as she or he wished, independently of the others.

The value placed on sibling coordination efforts was illustrated through interviews with pairs of caregiving sisters that yielded the finding that siblings monitor each other's activities related to parent care in order to avoid duplicating or overlooking care needs (Matthews & Rosner, 1988). Patterns of sibling coordination that evidence shared parent care responsibility were found in a study of helping behaviors that entailed an examination of longitudinal data from nearly 6,000 adult children in the National Long-Term Care Survey (Dwyer, Henretta, Coward, & Barton, 1992). Siblings were found to be acting "in concert" in responding to the needs of parents. When "siblings

started providing assistance, the odds of an adult child initiating assistance were greater" (p. 372).

Some researchers have examined coordination to learn how the sharing of caregiving tasks is determined among groups of siblings. Through her interviews with 50 adult child caregivers, Merrill (1997) found processes for selection among siblings. Caregiving was sometimes apportioned de facto because no one else was available or perceived to be capable. Alternatively, caregivers and their tasks may have been decided through a family meeting process where some siblings indicated that they were not available. Caregivers may also have been selected directly by the care-recipient parent. In still other instances, caregiving may have evolved from situations of co-residence or training related to caregiving. A final pathway to assuming parent care responsibilities was volunteering for the role without the consultation of a family meeting (Merrill, 1997).

Finch and Mason (1993) captured some of the variety of procedural aspects of caregiving in their findings of two distinct styles of determining who will help in what ways. Based on their interviews with family members about how assistance is provided, these researchers noted that families might pride themselves on their use of open discussions to determine and communicate who will assume which tasks. Conversely, families may take pride in the fact that open discussion is unnecessary. In the latter case there is a sense that offers of needed assistance will be automatically forthcoming (Finch & Mason, 1993).

Regardless of the approach to determining how care will be given, the existence of processes for dealing with this determination supports the idea that siblings regard

parent care as a shared responsibility. However, once behaviors are examined, not in terms of planning or coordinating, but in terms of actual substantive caregiving contributions or tasks, a different picture of sharing emerges.

Substantive factors comprised of actual care task contributions tend to be diverse and uneven within sibling groups. Some studies of how caregiving tasks are shared among siblings have delineated care according to the types of tasks performed. For example, based on the types of tasks, Matthews and Rosner (1988) identified five styles of caregiving from data from their interviews of 50 pairs of sisters who had at least one parent aged 75 years or older who ranged from completely independent to completely dependent. These caregiving styles illustrated a range and variety of contributions to parent care. They described routine caregiving as entailing provision of regular assistance and back-up caregiving as assistance that can be counted on when the routine caregiver asks for help. A circumscribed caregiving style was found to be highly predictable, but carefully bounded, whereas a sporadic style is one in which help is provided at one's convenience. The final style, dissociated, means no involvement in meeting care needs. The number of siblings in each family is important in relation to styles of caregiving. When only two sisters were looking after their parent, routine and backup styles prevailed, with circumscribed, sporadic, and dissociated styles rarely occurring. In families with more children, additional styles usually were present. Further, brothers were more likely than sisters to use circumscribed, sporadic, and dissociated styles.

The findings of other researchers also show a difference in sibling caregiving behaviors according to gender. Stoller, Forster, and Duniho (1992) examined factors related to the participation of adult children in helping networks through interviews with

584 people over age 65 and their self-identified "biggest helper" (p. 34). They found that women were more likely to provide care than men were, as well as to provide consistent, necessary tasks compared to the more intermittent help provided by men.

Personal Factors as a Basis for Comparing Diverse Parent Care Contributions

Although siblings believe that parent care should be shared and these beliefs are supported in the findings on involvement in procedural aspects of care, substantive aspects of care tend to be diverse. Siblings compare their diverse substantive contributions in light of numerous personal factors. For example, the relevance of gender, employment status, proximity, other family responsibilities, and sibling personality were discussed in a focus group study of what helps and hinders caregivers in their efforts and whether involvement from other siblings is adequate (Ingersoll-Dayton et al., 2003).

The influence of personal factors was also prominent in a study of how family responsibilities are managed. Finch and Mason (1993) conducted interviews with 88 family members in various combinations of spouses, siblings, parents, and children. Some interviews were held with individuals, others with two family members, and still others with between three and eight family members. The results illustrate a diversity of contributions by family members depending on personal factors. For example, one participant explained his vision of how tasks would be apportioned for the period following the anticipated death of his father. He noted that he would be responsible for all funeral arrangements because his employment background leaves him well suited to manage such planning. His brother would take care of all dealings with relatives surrounding the death, and yet another brother who lived near their mother would "look

after" her through the process. Contributions in this example were determined, in part, by employment background and proximity to the care recipient.

Siblings approach caregiving as a shared responsibility, yet take account of personal factors that influence individual contributions. Once personal factors are considered, siblings have been found to judge the contributions of other siblings in terms of whether these constitute enough of a contribution to meeting care needs (Cicirelli, 1995; Finch & Mason, 1993; Ingersoll-Dayton et al., 2003; Merrill, 1997). In Finch and Mason's interview study (with 88 family members) on how assistance is provided in families, the participants considered the appropriateness of other family members' limited contributions in terms of legitimate excuses. Alternatively, the participants in a study on juggling employment and parent care that entailed interviews with 40 siblings spoke of other siblings' limited caregiving in relation to flimsy excuses (Merrill, 1997). In a study of 63 focus group members of "caregiving couples" where both partners were employed and also had dependent children, the participants discussed personal factors with regard to themselves and their siblings; nearly two thirds concluded that their siblings were doing insufficient amounts of parent care (Ingersoll-Dayton et al., 2003).

When siblings believe that other siblings are not doing enough in providing parent care, they may take steps to increase equity by employing cognitive strategies that entail drawing upon comparisons of personal factors as a means of rationalizing the lesser contributions of siblings. For example, among the 63 participants in Ingersoll-Dayton et al.'s (2003) focus group study on balancing work and caregiving responsibilities, some participants used factors such as another sibling's employment commitments or geographic distance from the care recipient parent to explain that sibling's lesser

contributions to parent care. Similarly, Globerman (1995) studied family reputations and responsibilities in the care of relatives with Alzheimer's disease and noted that expectations for sharing caregiving tasks were evident in her interviews with 97 adult children from 38 families. The siblings evaluated and criticized each other's contributions to caregiving, including in a number of instances the lack of contribution from an "unencumbered" sibling whom the others took efforts to describe as exempted from caregiving tasks because of personal factors such as the inability to deal with a crisis.

Lerner et al. (1991) used data from interviews with 140 pairs of caregiving siblings and reported findings consistent with the idea of siblings using cognitive strategies to increase perceived equity. Although some participants believed that, comparatively, their siblings were contributing less to parent care, these participants persuaded themselves of their siblings' good efforts (Lerner et al., 1991).

Alternatively, efforts to achieve equity initiated by the more involved siblings have been shown to take the form of requesting greater involvement from less involved siblings. Siblings have been found to use strategies such as hinting or asking outright for help from siblings (Ingersoll-Dayton et al., 2003). Further, when attempts to achieve equity are unsuccessful, conflict may result. In fact, conflicts and disturbed relations between caregivers and their siblings were described as a "very important aspect of family relations" (Lerner et al., 1991, p. 747).

Caregiving research that has been aimed at understanding fairness among siblings indicates that the amount of care given by respective siblings is an important issue; specifically, concerns with siblings who are not doing enough towards parent care. Further insight into how the extent of involvement in caregiving influences views of

fairness may be gained from legal portrayals in which the sharing of caregiving is considered in relation to the sharing of parent assets. The explicit connection of parent care and parent assets is evident in the concept of care agreements.

Sibling Comparisons When Assets Are Exchanged for Care: Care Agreements

Issues of fairness are at the forefront of the concept of care agreements because they involve attempts to increase equity within families by exchanging parent assets for care. Care agreements tend to occur in caregiving families with multiple children where each makes different contributions. As one way of increasing family equity, those perceived by the care recipient parents as making greater care contributions receive greater shares of parent assets (Hall, 2002b). Agreements are usually motivated by a parent's desire to continue residing in the family home in the face of declining independence. A parent may also be seeking companionship and wishing to avoid being cared for by strangers. Additionally, offering property for care is a way for a parent to provide for an adult child (Hall, 2002b).

Studying the connection between caregiving and property transfers, Heenan (2000) reported on interviews with 13 farm wives and concluded that, as a result of inheriting the family business, adult children feel obligated to provide care. Bequest motives were also found to influence care being given to aging parents (White-Means & Hong, 2001). Using a subset of data from the 1992 Health and Retirement Study conducted by the Institute for Social Research at the University of Michigan and the National Institute on Aging, White-Means and Hong found that competition exists between siblings and concluded that adult children are more likely to provide time and

money to parents if they have siblings, the presence of whom was interpreted by adult children as competition for bequests.

Some legal practitioners in Canada and Australia have recently concentrated on the phenomenon of care agreements or family agreements, respectively (Hall, 2002a; Herd, 2002), which are increasingly commanding attention when they are legally disputed. These legal disputes often involve undue-influence claims in which one or more siblings claim that caregiving sibling(s) have exerted excessive influence to obtain parent assets. Response from legal practitioners has taken several forms (M. I. Hall, personal communication, December 9, 2003), including an analysis of care agreements that have required legal intervention to identify why problems arise. These analyses have been the subject of professional discussion in legal circles and subsequent publication in legal journals to better equip the legal field to respond to families who are planning to establish care agreements as well as to deal with disputed agreements.

Care agreements are being established, yet the details about their prevalence are not known (Hall, 2002a). Such agreements tend to be "made on the basis of oral promises and stated in the most general terms" (p. 216). Particularly when agreements are between family members, people may feel uncomfortable about formalizing them and choose instead to rely on family trust and affection (Hall, 2002a). Care-receiving parents may be reluctant to openly discuss care agreement arrangements in the belief that open discussion is unnecessary in families that are "close" and "nice," and family members in general may construe initiating open discussion as a lack of confidence (Hall, 2002a; M. I. Hall, personal communication, December 9, 2003). As a result, caregiving tasks are often not clearly articulated, and assets being given in exchange for care may not be plainly

understood within the family, which predisposes the agreement to disputes. When legal disputes over care agreements occur between siblings, diverse evaluations of costs, rewards, and caregiving equity become evident; when these disputes entail claims of undue influence, issues of sibling overinvolvement in decisions on asset distribution and caregiving-task distribution are brought into focus.

Summary

Research on siblings who provide parent care has indicated that siblings believe that they are "in this together" and strive for fair sharing of responsibilities. Siblings calculate caregiving costs based on individual standards, yet judge what should be done and compare their contributions by using the principles of filial responsibility and genealogical equivalence. At the same time, a variety of caregiving styles are practiced and an array of personal factors is considered when siblings evaluate the adequacy and fairness of their respective involvement. Sibling concerns with fairness have been found to center on other siblings' insufficient involvement. Very little research discussion is offered about the other side of this issue in which sibling distress stems from the overinvolvement of other siblings. Documentation of legal disputes provides evidence of such problems among siblings in the form of claims of some siblings' overinvolvement in parent care and asset decisions.

Evidence of fairness among caregiving siblings has often been derived from research on topics tangential to equity, such as filial responsibility and managing care responsibilities. Although these lines of inquiry have allowed us to see the importance of the extent of involvement in caregiving, there is a virtual absence of discussion in the

caregiving research literature about aspects of fairness that may be important to siblings other than level of involvement.

Steps were taken here to address these gaps through an examination of caregiving-sibling beliefs about fairness, including beliefs related to the idea of care agreements. In entailing exchanges of assets for care, care agreements may be used to bring issues of fairness into focus; disputed care agreements in particular provide a focus on equity as beliefs of siblings involved in disputes are clearly delineated given that they are occurring in the context of a dispute. Disputes over care agreements, including formal legal disputes, have yet to be encompassed under the purview of family caregiving research and will be treated here as new sources of insight into caregiving fairness broadly and concerns with overinvolvement by some siblings in particular.

CHAPTER 4:

RESEARCH METHODS

This approach to understanding caregiving equity entailed an examination of a diverse collection of stories of sibling caregiving. The decision to gather and analyze stories was informed by narrative tradition; specifically, the belief that stories provide access to the richness of experience (Rosenblatt, 2001). An array of stories of siblings' provision of parent care was sought to learn about how siblings evaluate fairness. In addition to including examples consistent with previous findings that siblings experience equity problems when other siblings do not do enough in providing parent care, examples were included in which some siblings' overinvolvement was a concern, as well as examples in which aspects of the care situation other than the amount of care provided were salient.

A *story* is defined here as a coherent account of lived experience, in sequence, across time, that makes sense of life (White & Epston, 1990). Obtaining accounts of experience across time provided insight into the development of how siblings calculated and compared their caregiving costs and rewards. Two distinct types of stories were collected, one in the form of first-hand sibling accounts obtained through in-depth interviews with the siblings, and the second in the form of third-party accounts of siblings' experiences provided by judges who evaluated, then summarized the siblings' perspectives to comprise written legal case documents.

The siblings interviewed offered detailed accounts of their experiences with how parent care tasks and parent assets were distributed among the siblings, whether the distribution was fair, and the bases on which fairness was evaluated. An interview guide

was used to elicit stories of how caregiving was determined and provided, and to draw out information on how assets were distributed and considered to influence the perceptions of overall fairness among caregiving siblings in light of care that had been given. This sequence of interview questions established caregiving as the focus of the interview, with questions about asset distribution following in relation to the caregiving. The siblings shared their experiences and beliefs as part of a conversation, most often with only the researcher, although in some instances a sibling's spouse and/or other sibling(s) were also present. The siblings interviewed were motivated to share their stories by a belief in the importance of the subject and an interest in supporting a research endeavor.

Compared to interview data, the legal case documents, compiled by judges, supplied information about a family's background and structure as well as the progression of the parent's health status and need for care, including how these needs were met. This description is provided as a context for the focal issue, which is sibling disagreement over how parent assets were distributed. Asset distribution is described in relation to parent care provision, and beliefs are summarized pertaining to how parents may have used assets to compensate or reward siblings for their caregiving and/or how caregiving may have enabled particular siblings to influence parents in ways that resulted in parents giving their assets to those siblings. Excerpts from the testimony of siblings and others involved with the family around and during the phases of caregiving and estate planning are included. Each legal document is concluded with the judge's ruling and rationale for the ruling.

Legal case data depict pronounced beliefs of unfairness among siblings. In many of the cases, at least one sibling used these beliefs to try to convince a judge that one had done more than he or she was being credited for or that one's sibling had done less than he or she was being credited for, and thus the judge's ruling should require that assets be distributed to recognize these claims of who had done what. Compared to the interview data, the legal case data reflect beliefs that were presented in clear and unambiguous terms to constitute the "facts" of a case. Unlike the interview data, there is little indication in the legal cases that siblings experienced mixed emotions or softened stances towards each other. Sibling beliefs comprising the legal cases provided evidence of some of the same themes from the interview data, but illustrated more extreme examples of the themes compared with the interview-data theme examples.

This research design of collecting both types of stories was crafted in the interest of capturing breadth as well as depth of data. Breadth was encompassed because the siblings interviewed, although few in number and relatively homogeneous in terms of soico-economic status and ethnic background, represented a variety of caregiving situations in terms of duration and level of care needs. Further, some of their experiences were harmonious, whereas others involved considerable conflict over giving parent care and receiving parent assets. The legal document source added breadth to the data by encompassing cases from across Canada that illustrated equity issues related to legal disputes over asset distribution in relation to parent care that had been given. Some additional depth, particularly about conflicts over equity, was offered through the legal sources given that the conflicts profiled had occurred in the context of a variety of care needs and for a variety of reasons and were often described in detail.

Sources of Data

Data were obtained from two groups of siblings as well as from a collection of legal case documents. Using these two data sources afforded access to sibling beliefs about equity in a range of situations, from harmonious to fraught.

The first group included six siblings from five families and the spouse of one of these siblings. These siblings had no apparent conflict over the distribution of parent care and parent assets and were interviewed in the interest of learning about what can constitute a fair sharing of care. The second group included five siblings from three families and the spouses of two of the siblings. These siblings had experienced at least some degree of conflict over fairness and had sought legal services to work through the particulars of dividing their parent's estate in light of who provided what type and level of care while the parent was living. This group offered perspectives on the types of problems that siblings encounter in sharing care and assets that lead to legal-service involvement.

All siblings interviewed were from families in which issues of distributing parent care and parent assets were relevant. At the time of the interviews, parent care was either being provided or had been provided until the time of the parent's death. When the care recipient parent was deceased, as was the case for seven siblings (and the spouses of two of these seven), the parent's death had occurred as little as three months and as much as six years prior to the interview. Siblings from these families had worked out, and in some cases continued to work out, the distribution of parent assets. Four siblings (and the spouse of one of these four) from families in which care was still being provided shared their knowledge and beliefs about the anticipated distribution of their parent's assets.

Finally, legal data were collected from a small body of Canadian cases that portrayed sibling disputes over the fairness of who received what from a parent estate in relation to who provided what in terms of parent care. Ten Canadian legal cases that focused on these issues were found and analyzed. This collection included at least one case from each of six Canadian provinces (British Columbia, Alberta, Ontario, New Brunswick, Nova Scotia and Prince Edward Island). Five of the ten cases are from British Columbia. The oldest legal case is from 1995, and the most recent is from 2003. These cases were studied to learn how parent care and assets had been shared and what elements of this sharing were considered unfair to the extent that a full legal process was undertaken.

Siblings

Inclusion criteria. To be included in the study, siblings had to be part of a situation that currently or previously involved sharing parent care and parent assets. Because the goal of the study was to learn about fairness among those in equivalent positions, it was necessary that the siblings interviewed be from families in which all siblings shared two biological parents. The sibling participants were also required to be of Euro-Canadian descent in order to minimize cultural diversity and keep the scope of the study manageable.

Effort was made to interview as many siblings from each family as were available and would agree to participate. The goal of including multiple siblings per family was rooted in the assumption that people's evaluations of equity differ (Sabatelli & Shehan, 1993). Multiple perspectives afforded the opportunity for comparison of beliefs about fairness from within families. Researchers have endorsed including multiple perspectives

with claims that obtaining input from more than one family member more fully captures the richness of family life (Guba, 1990; Nadeau, 1998; Piercy, 1998).

Recruitment of siblings sharing parent care and parent assets where there was no apparent dispute. The first group of siblings, comprised of those sharing parent care with no apparent dispute, was recruited through two long-term care facilities and one seniors' education institute in a major city in Western Canada. The long-term care centers are operated by an organization with a history of partnership in university research projects. The senior studies institute is located within a post secondary educational setting and provides education and resources to senior citizens. Part of the offerings of the institute involves making seniors aware of volunteer opportunities including calls for participants in research projects. Social workers from the long term care centers and a supervisor from the senior studies institute who were familiar with the family circumstances of their clients were asked to approach prospective siblings about their willingness to participate. Additionally, written requests for participants were placed in a newsletter of the senior studies institute, and posters were placed in the foyers and nursing stations of the long term care facilities (Appendix A). Siblings with parent care experience who were willing to discuss the fairness of sharing parent care and parent assets were asked to contact the researcher. A social worker employed in one of the long-term care centers referred the siblings from two families to the researcher. Siblings from two other families contacted the researcher in response to the notice in the senior studies institute newsletter. The sibling participant from the final family is the spouse of one of the siblings referred from the second group described below and was asked by the

researcher to participate when it became apparent at the beginning of her husband's interview that she was also part of a parent caregiving family.

Recruitment of siblings who sought legal services to work through issues of equity in giving parent care and receiving parent assets. The second group of siblings were accessing legal services to work out the division of their parent's estate and were recruited through a law firm, located in a major Western Canadian city, with a specialization in issues of wills and estates. An estate lawyer directly approached clients who had received legal intervention over parent asset distribution that had immediately followed a period of parent care. The lawyer inquired about sibling willingness to take part in a study by discussing their experience and views about the fairness of sharing parent care and assets and obtained their permission to be contacted by the researcher. The wills and estate lawyer referred siblings from three families, all of whom agreed to participate.

Willing sibling participants from all sources initiated or responded to telephone contact with the researcher and had the study explained in detail in accordance with the oral request for participation outlined in Appendix B. The researcher answered their questions and informed the participants that the study required their participation in an individual tape-recorded interview with the researcher that would last approximately 90 minutes. During the initial contact, the participants were asked to refer siblings who might also be willing to take part. The researcher then contacted these siblings, requested their participation, and provided a detailed explanation of the study.

Procedure: Sibling Interviews

Face-to-face interaction has been called "the fullest condition of participating in the mind of another human being" (Lofland & Lofland, 1984, p. 11). Interviews afford clear and direct access to meanings and other subjective information (Rosenblatt & Fischer, 1993). Interviews were used in this study to capture subjective accounts of the fairness of sharing caregiving contributions (costs) and asset entitlements (rewards) related to aging parents.

The siblings were interviewed in person, most often in their homes. One sibling was interviewed at a coffee shop and another at her place of work. One participant who came from out of town was interviewed at the researcher's home, and another from out of town was interviewed at the hospital where his mother had undergone surgery. The interviews ranged in length from three quarters of an hour to two and one half hours. Each interview began with a review of the information sheet for the study (Appendix C), followed by a review and signing of the informed consent form (Appendix D).

To gather sibling stories through the research interviews, an interview guide was created to support rapport with the participants and to allow flexibility of the interview structure around predetermined topics (Patton, 1987). A list of questions was used, beginning with a request for background information about family structure (number, birth order, and gender of siblings). Questions were then asked to elicit stories of caregiving, including the overall experience of parent care, how responsibilities were divided among siblings, and through what processes, and then how parent assets were divided and whether there was a connection between caregiving and asset distribution.

The participants were asked their views on the fairness of how caregiving and assets were shared among their siblings.

To ensure that the interview guide was effective in drawing out caregiving stories and comparisons among siblings, the questions were piloted with the investigator's colleague, who had been significantly involved in caring for her mother-in-law. This colleague's sister-in-law—daughter of the care recipient—was also interviewed. Following the pilot, the wording of the questions was refined. Subsequently, the first sibling interviewed as part of the study sample initiated a discussion about how the parent care experience had impacted his relationships with his siblings, and this was added as a specific question in the remaining interviews. The final version of the interview guide is attached in Appendix E. The researcher took field notes during the interviews. Interviews were tape recorded and transcribed.

All but three participants were interviewed once. The brother and sister in law who were interviewed together from the Draper family had a second interview, also together, as the sister and brother-in-law from the Ellingham family. A second interview as also held with the brother from the Henry family to allow him to share records of written correspondence among the siblings when it became apparent during the first interview that these records would add valuable perspectives on the issues discussed. A sibling from another family also shared records of written correspondence, but this sibling arrived at her first and only interview with these records.

In the three interviews where sibling spouses participated, this participation was at the initiative of each sibling who considered his or her spouse to have been central to the caregiving.

The consent form requested permission to recontact the participants for clarification or elaboration of their responses, but no siblings were recontacted. A description of the interview participants and the duration and location of interviews is summarized in Appendix F.

Legal Case Documents

Legal case inclusion criteria. Legal cases were included in the sample if they depicted sibling disputes over parent assets that were being used to compensate or reward caregiving. It was required that siblings in each legal case share two biological parents in accordance with the study goal of learning about equity among those in genealogically equivalent positions. To be included, legal cases had to have been initiated in 1995 or later. The 10-year time limit was set in the interest of collecting data related to contemporary family caregiving issues. The time frame was consistent with interview data that revealed that the earliest parent caregiving situation had ended in 1998, whereas the most recent was ongoing. Unlike the siblings interviewed, siblings portrayed in the legal document sources could not be specified by cultural background.

Collecting legal case documents. Like most official records, legal cases were created for examination by others and written in a more or less standardized form, then systematically arranged in the archives (Berg, 2004). Legal cases were obtained from three electronic legal databases. The LawSource, National Reporter System, and Quicklaw databases were searched using the search terms *caregiver* or *caregiving*, in conjunction with *elderly* and *estate* or *inheritance*. An additional source of legal cases fitting the inclusion criteria was a list that had been assembled by the British Columbia Law Institute Project Committee on Legal Issues Affecting Seniors in the preparation of a

Consultation Paper on Private Care Agreements between Older Adults and Friends or Family Members. All cases on this list, along with all cases that contained the designated search terms from within the three databases, were screened; and all cases depicting those biological sibling disputes from 1995 onward over parent assets that were being used to compensate or reward caregiving were reviewed and those (ten) depicting themes specific to comparing caregiving costs and asset entitlements and evaluations of fairness based on these comparisons were included for analysis.

Data Analysis

The analysis of interviews and legal cases began with a broad organization of the data achieved through repeatedly listening to the interview tapes and reading the interview transcripts and legal case documents (Marshall & Rossman, 1989). The interview transcripts were compared against the field notes to check for accuracy (Harris, 1998). Once a familiarity with the data was achieved, a content analysis was conducted. Content analysis was used in its broad definition as involving an examination of what was in the text and "giving it a name" (Patton, 1990, p. 381) or code. Codes or themes were chosen to "reflect all relevant aspects of the messages and retain, as much as possible, the exact wording used in the statements" (Berg, 2004, p. 268). At the same time, sensitizing concepts from the literature were used to provide "directions along which to look" (Patton, 1990, p. 391) for themes. For example, data were coded according to whether the aspects of caregiving that the participants described were procedural or substantive in nature and according to whether they took personal factors into account in determining the fairness of how the caregiving was shared.

This analysis followed an interpretive practice of attempting to uncover patterns (Berg, 2004, p. 266). Patterns that were identified were compared within and between stories, which included applying an adapted version of what Patton (1990) distinguished as case analyses versus cross case analyses. For the interview data case analyses, themes and patterns from all siblings interviewed from within the same family (rather than each individual sibling) were identified and described. These descriptions are presented as findings in the form of profiles of all available sibling perspectives for each family. A cross-case analysis was also conducted to encapsulate themes and patterns from across all of the siblings interviewed and is presented in thematically organized findings from the interviews. For the legal case data, only cross-case analyses were performed given that the legal cases, compared with the interview data, were more formal and less detailed and thus limited the potential for comparisons within cases. Further, the interview transcripts and legal case documents were analyzed simultaneously, which allowed for a comparison of themes and patterns between the two sources. These broader comparisons across cases are summarized in the legal case findings and discussion chapters.

Confidentiality

No interview participant names were used. However, privacy difficulties may arise in light of the small sample size (11 siblings), which makes individuals easy to identify. This risk was discussed explicitly with the participants before the interviews began. Where participant quotations are used in this research report, information that might give clues to their identity, such as the city of residence, the country of origin, or the name of the long term care facility, has been removed or changed.

Research Strengths and Limitations

This study's design of using both document and interview data is a key strength. Documentary records have been discussed as affording access to information about people and their interactions that is "simply unreachable through any other means" (Berg, 2004, p. 209). In this study the use of legal case documents incorporated stories of such discord that the siblings involved would have been unlikely to agree to discuss their experiences as part of a research project. At the same time, the legal cases are limited as a source of data in that they depict stories that are entirely aimed at prevailing over a competing story. The legal case conflicts were examined alongside situations depicted in interviews that were either relatively harmonious or characterized by conflict but not pursued through the courts. The documentary record data and interview data offer stories told in two distinct styles to two distinct audiences and were brought together in an attempt to "capitalize upon the different logics" (Finch & Mason, 1990, p. 173), one for a legal purpose and one for a research purpose, which underlie the two sources. The range of perspectives included through this process yielded a more complete picture of issues of equity among caregiving siblings than either source alone would allow.

A further strength of encompassing a wide range of perspectives was evident in the inclusion of stories from siblings at various stages of giving care and receiving assets. The parent of some siblings interviewed was still residing in a private dwelling or in long-term care, whereas the parent of many other siblings interviewed, and all siblings depicted in the legal data, was deceased. Although in families where the parent was still living, sibling views about the full experience of giving care and receiving assets were

partly speculative; this speculative quality is clearly acknowledged and adds to the perspectives captured.

Data from interviews with eleven siblings from eight families and legal case conflicts among siblings from ten families permitted illumination of siblings' subjective experiences with sharing parent care and assets and their views of the fairness of their sharing. However, given this small sample, this study does not include any claims of theoretical saturation. Themes continued to emerge with each additional interview and legal case analysis.

A further limitation of this research lies in the relatively small number of siblings interviewed from each family. It was the intent in this study to interview multiple siblings from each family. However, in six of the eight families, only one sibling consented to be interviewed. Some siblings had multiple competing demands on their schedules that prevented scheduling an interview. Moreover, in a number of the families, issues of fairness had entailed conflict among the siblings to the extent that some refused to be involved in anything, including a research project, related to these issues. In some families one sibling consented to participate only on the condition that other siblings were not involved. In another instance, because one sibling was participating in the study, another refused to participate. Whatever the reason, this study is missing the perspectives of the siblings who were not interviewed. Given the often-contentious nature of the data collected, these missing perspectives may amount to not having some siblings' "sides of the story." This concern was addressed to an extent in that in some of the conflicted situations, the sibling interviewed provided some perspectives of other siblings by reading letters and printed records of email correspondence. Yet it is important not to

assume that these communications written by other siblings fully represent their perspectives, because it was the sibling interviewed who had control over which correspondence to share. As Lennon and Burns (2000) pointed out, interview participants offer only what they are comfortable telling.

Cicirelli (1995) cautioned further that with sibling research there is a risk of overrepresenting particular siblings' perspectives if one sibling is asked about relationships with a number of others. Several siblings interviewed in this study were from relatively large families and commented in turn on the participation levels of, and their relationships with, each of several others. In the extreme, only one sibling from a family of seven siblings was interviewed and provided commentary on each of the six others. This concern with particular voices being overrepresented has been addressed in part by assigning pseudonyms to the siblings so that in the report of the findings it is clear whose perspective is being described. The reader may decide the relative weight to be assigned to the voice. Further, descriptions of the size of each sibling group are provided to allow the reader to appreciate any particular voice as one of whatever the sibling group size was.

The risk of over representing particular sibling perspectives is also present in the analysis of the legal case data. In some cases the dispute was between two or three siblings from a group of seven, eight, or even nine. This concern was addressed to some degree by indicating the size of the sibling group for each legal case as well as including available sibling views from within each group in addition to the competing sibling perspectives that were the focus of the legal action. For example, in a case in which a brother contested what he claimed was undue influence over their mother by his sister,

another brother agreed that their mother and sister had a particularly close connection, but did not support his brother's claim that this connection entailed undue influence. This second brother's perspective, though not focal to the legal dispute, is included in the discussion of this case.

As intended at the outset of this study, the siblings who were interviewed provided accounts of their experiences with sharing and fairness across time. At the same time, these accounts were contained, in all but one case, to a single interview. Aspects of siblings' background relevant to their beliefs about fairness were surely omitted in these time-limited accounts. Similarly, each legal case portrayal includes a judge's summary of background information related to the equity dispute. As with siblings who represent experiences and beliefs in a time-limited interview, judges who represent perspectives in a concise legal document are unlikely to account for all relevant details.

CHAPTER 5:

INTERVIEW FINDINGS

Sibling Sample Description

This chapter of findings from interviews with siblings begins with family-by-family descriptions of sibling experiences with sharing parent care and parent assets. These descriptions are presented in the order in which the interviews occurred. The siblings from each of the eight families have been assigned a term or phrase that encapsulates the tone of their experience with sharing parent care and assets. These terms or phrases were chosen near the end of the analysis after many reviews of the transcripts and tapes and reflect the main ideas that underlie the experiences and beliefs that the siblings expressed. In choosing the terms, verbal messages as well as vocal inflection and other nonverbal indicators such as sighing, groaning, laughing, or crying were taken into account.

Descriptions of sibling experiences in the eight families are followed by evidence of themes from interview data. These themes pertain to sibling beliefs about what they should do for parents in need of care, how the fairness of contributions is evaluated and how parent assets should be distributed.

Partners: Siblings in the Barclay Family

The Barclay family has three siblings, two of whom shared most of the responsibility for care of their mother, who had been residing in long term care for two years following a major stroke. One brother from this family, Grant, who lived in the same city as his mother, was interviewed. He described his caregiving as part of a close partnership with his local sister, Katherine.

Grant highlighted the difficult time that immediately followed his mother's stroke, including the period of not knowing the impact of the stroke and the experience of receiving the news that his mother would require complete care for the rest of her life. He described the subsequent period of awaiting and moving to suitable residential placement as a scary time for his mother and a demanding time for himself and Katherine. Grant noted that during their mother's poststroke hospitalization and move to long term care, he and Katherine visited her every day: "It was just an expectation we put on ourselves." Over time, the need to "live our own lives" led the two siblings to adjust their visiting to a more manageable schedule of alternate days as well as to hire a companion for their mother. With this visiting schedule, their mother had company every day, and Grant and Katherine could monitor the long term care environment. Although Grant characterized this as being less demanding than his mother's transition had been, there was nonetheless "always something" to be addressed to ensure that their mother's needs were well met in the long term care center.

As well as closely monitoring and responding to care needs, Grant articulated his and Katherine's careful efforts to stay attuned to their mother's communication abilities given the impairment caused by the stroke. He and Katherine had learned that the only word at their mother's disposal could have a number of meanings and "should not be taken at face value." Grant also explained his efforts to "broaden my mother's life" by doing things such as taking old friends and neighbors to the long term care center to visit. He saw providing such frequent and careful attention to their mother's needs as a natural extension of their earlier relationship. Grant reflected on his upbringing and concluded, "I owe her some care."

Katherine had also agreed to be interviewed but subsequently found herself unable to commit the time required as she balanced her full-time job, care for her mother, and care for her grandchildren. Grant described Katherine as attentive and generous in her contributions to their mother's needs. He noted that they thought similarly about how best to meet their mother's needs; for example, they had quickly reached agreement to use their mother's financial resources for her comfort by hiring a paid companion. Grant commented, "We haven't found anything we disagreed on yet." He expressed his view that the experience of caring for their mother had actually enhanced his relationship with Katherine. They were ten years apart in age and had not had much contact in their younger lives. Their mother's care needs "gave us things that we needed to talk about, or at least that we felt we needed to talk about, and so there was a lot closer connection that developed. . . . And I've mentioned that to her, that I felt closer to her than I ever have, and she's acknowledged the same sort of thing."

The third sibling, John, had "always lived at a distance" and visited infrequently. From where he lived, John found it more manageable to fly in rather than drive to visit their mother. Yet he contained his visits to day trips rather than overnight stays. Grant described John as "out of the picture; he's been the absent son for a long, long, long time." Grant indicated that although John did not hinder the caregiving efforts, neither did he help. Given his distance from the day-to-day care, decisions were in the hands of the two local siblings, and John was not consulted, but rather given periodic updates.

In all, Grant's focus was on how well he and Katherine worked together to meet their mother's care needs. He concluded, "I'm lucky to have a sister like her."

Opponents: Siblings in the Baker Family

In the Baker family there are two siblings of opposing caregiving styles and beliefs. One sister, Linda, provided seven years of live-in care to her father, who had dementia. Linda was interviewed and, as part of her response to the interview questions, shared written correspondence between herself and her younger sister, Joan, from whom she was estranged. Knowing of Linda's participation in this study, Joan declined to be interviewed.

Although Linda characterized her caregiving experience as stressful and "very, very draining emotionally," she considered it to be her way of protecting her father and honoring his wishes. Linda portrayed her choice to provide live-in care to her father as rooted in the family's experiences as immigrants to Canada in the 1950s. The family struggled financially as well as with their mother's mental illness: "I mean, we were living in poverty, we were new immigrants, we had absolutely nothing, yet my mother was very, very ill." Linda described this experience as testing and building her own resourcefulness, leaving her "fearless" and quick to face problems: "I walked in when others were walking out." She expressed her resulting high regard and compassion for her father given the difficulties that he faced as a laborer supporting a young family, including a sick and volatile wife: "I have great respect for my father. I really empathize with everything he'd gone through in his life." Linda contended, "A lot of men would have packed it in." She proclaimed her "tremendous gratitude to my father that he was strong enough to stick with it" and described her response to the onset of her father's dementia and need for care: "All I did know is my father needed help and I was going to stand by him, you know, no matter what."

Linda pointed out the contrast she perceived between her own and Joan's style of managing amidst the family's struggles. Describing herself as having taken a leading role in addressing difficulties, she spoke of Joan's response as "denial," "hiding," and "removing herself." Yet, regarding her father's care needs, Linda acknowledged that Joan contributed through church and lunch outings as well as visits with her father at Linda's home. But Linda made clear that she considered these contributions to be inadequate as she described Joan as having protected herself from the imposition of their father's care needs: "She left it all up to me. She's not helping out at all, you know." The opposition of the sibling perspectives was evident as Joan countered this idea in a letter to Linda in which she said, "Don't give me that 'I've done it all crap.'" At another point in the letter, Joan accused Linda of martyr behavior and sarcastically suggested, "Maybe you can pop Dad full of pills and drag him around the Oprah circuit."

In their differences of opinions over what should be done by whom in caring for their father, these two sisters compared their respective contributions in a competitive fashion consistent with competitions during childhood. In one example the sisters had a disagreement, each accusing the other of not doing enough for their father. Childhood resentments were evident in a letter from Joan as she contended that she had done a great deal for their father following his heart surgery. In her letter she sarcastically asked whether Linda would reward her as she had done in childhood: "Here you go with the glass of Coke again. . . . How many drops do I get for that?"

In a further example, a disagreement over what should be done for their father was addressed in a manner that might be expected in a childhood sibling dispute as Joan threatened to report perceived inadequacies in Linda's care to a higher authority. Joan

had written a formal letter of complaint that Linda was not permitting her father to sleep on a new bed that had been purchased for him as Linda was using this bed for a houseguest. The letter from Joan to Linda concluded with a threat to report the situation to social services: "Get the gist? If Dad doesn't sleep on his bed by the weekend, this will be in the mail on Monday."

An additional struggle, reminiscent of childhood disagreements among siblings, concerned their mother, who had been living independently in an apartment, but wanted to return to her house. Linda agreed with their mother and supported her decision and arrangements to move back to her house. On the day of the actual move, Joan literally reversed the efforts that were underway. Joan "intercepted them, forced them to put everything back into Mother's apartment. . . . My sister had her children unpack everything back into her drawers, back into the closet, into her kitchen."

Disagreement typified these sisters' attempts to share caregiving responsibilities. Yet their efforts to share were not without evidence of concern for one another. Linda, for example, described Joan's having gone though a trauma related to Joan's own child. During this period the live-in caregiving sister noted her own efforts to protect her sister from the worry of their father's care. And correspondence from Joan revealed a concern for her sister's stress in providing live-in care. Joan expressed her view that their father should have resided in long term care rather than with Linda: "Taking care of him in old age against all odds, against all coping, is not what he wanted." Although concern for the other was evident in these claims, opposing views of caregiving continued to be prominent.

Odd Man Out: Siblings in the Cook Family

The Cook family has six siblings, five of whom were in regular contact and general agreement over how to provide care to their mother. One sister, Claire, along with her husband, Rick, had moved into her mother's home and provided care for approximately four years. Her mother was diabetic and had had a series of heart attacks as well as a stroke. A year before their mother's death, another sister, Anne, upon the loss of her husband, moved in with their mother, Claire, and Rick, and contributed to their mother's day-to-day care needs. The other four siblings visited their mother on varying schedules. A brother, Brian, visited daily for many years. A sister, Natalie, lived at some distance and had no vehicle so maintained contact through phone calls, letters, and infrequent visits. Steven, another brother, who has a disability, lived in a supported environment and visited alternate weekends. The fourth sister, Bev, visited infrequently and did not plan or coordinate visits with her siblings.

Three siblings in this family and the husband of one sister were interviewed; one interview included Claire and her husband Rick, as well as Anne who had moved in for the last year of their mother's life. Another interview was with Brian, the brother who had visited daily. They all characterized caregiving as a trying time, yet conveyed a warm and often humorous appreciation for their different sibling caregiving styles and contributions, with the exception of the involvement of one sister, Bev, which they considered inadequate.

Claire, Rick, and Anne described Brian as always forthcoming with offers of help; for instance, by transporting their mother to medical appointments. The sisters and brother-in-law gave a lively account of an instance when Brian's offer was accepted.

Brian had had great difficulty and an accompanying loss of patience with transporting their mother's wheelchair. An appreciation for his style of caregiving was prominent in the laughter of Claire, Rick, and Anne as they told this story and then quickly returned to describing Brian's sincere willingness and efforts to contribute.

In similar spirit, Brian described the contributions of Claire, Rick, and Anne and suggested that they could have done a better job of keeping their mother's house clean. Yet, like the overall assessment of Brian's contributions offered by his sisters and brother-in-law, Brian reported that he was "happy with what they did" and that the care they had provided had "allowed her to stay at home." Specifically, Brian noted, "Rick's cooking was the right stuff for her."

The three siblings' (and one in-law's) appreciation for each other's caregiving extended to valuing contributions that perhaps the contributing siblings themselves did not recognize or value. For example, Brian captured the benefit to their mother of being needed by her children as he summed up the involvement of a sister, Natalie, who lived at a distance and herself required support. Brian claimed, "In the same time as Mom was helping Natalie more, that was helping Mom." Claire also called attention to care contributions that may have gone unnoticed by the contributing sibling. She described how, when Anne had moved in with her, Rick, and the care-recipient mother, Anne was struggling with the loss of her own husband and had felt unable to contribute much to their mother's care. Claire qualified with the claim that despite the difficulties that Anne faced, she "was a help where she didn't know she was helping." Claire explained that Anne's presence offered convenient companionship and monitoring for their mother that enabled Claire and Rick to comfortably go out together.

These three siblings' appreciation for their varied styles left a sense of camaraderie among them. For example, Claire described their mother's needs and concluded, "My mom was a demanding woman." Claire laughed with Rick and Anne about the various ways that their mother exerted influence over the siblings and contended that their mother "knew which buttons to push." Rick smiled knowingly and commented, "She ran the family." Anne added her summary of their mother's style: "She was the matriarch."

Contrasting with this camaraderie, another sister, Bev, was regarded as having neglected both the care needs of their mother and the caregiving efforts of her siblings. Claire proclaimed that Bev had "added to my mother's hurt." Brian described this sister as visiting only on her own schedule and not responding to their mother's wishes or helping her siblings in their care tasks. Anne described Bev as someone "we don't know any more."

Broken Trust: Siblings in the Draper Family

In the Draper family there are two siblings who sat apart at their mother's funeral. One brother, Phil, along with his wife, Barb, had helped his mother with maintenance of her home, shopping, and social outings for many years when she lived on her own. Their mother had developed dementia, which eventually necessitated her move to long-term care. Phil and Barb then visited three to five times per week for the three years that she spent in long term care. The other brother, Dan, who resided in the same city, had little to do with the care of his mother. Phil and Dan were estranged, with their only semblance of communication routed through lawyers in relation to their dispute over the disbursement of the estate of the now deceased mother. Phil was interviewed together with Barb, given

Barb's high level of involvement in the caregiving. Dan was inaccessible; he failed to respond to messages from his brother and sister-in-law.

Phil opened his portrayal of caregiving by describing his mother as a woman whose "greatest love was bingo" and his caregiving focus as being to ensure that his mother did the things she enjoyed when she lived on her own. She subsequently moved to long term care following a serious fall and broken arm. Phil and Barb described the transition as a scary time for their mother. At this time Barb adopted a schedule of spending two or three days per week with Phil's mother in the long term care center. Phil visited on weekends because his work required that he travel Monday through Friday. It was important to him that he visit whenever his work schedule permitted and that Barb visit when he was not available. Barb's visit schedule increased to daily during the last six months of Phil's mother's life because she had made it a habit to spend time coaxing her mother-in-law to eat her evening meal.

By contrast, Phil described Dan as having little patience for or interest in their mother. Phil conveyed disappointment in Dan's lack of involvement in the care of their mother and noted that Dan had been well provided for by their parents, including in his young adult years when his parents helped him to establish his own business through their financial support. Phil noted that he had previously felt some satisfaction in that Dan had acknowledged the unevenness of their respective care contributions when he told Phil that because of all he had done for their mother, Phil deserved to ultimately inherit the family home. However, for Phil, this was followed by a sense of betrayal. A technical error in the preparation of their mother's will resulted in the will's being declared null and void. It had stipulated that the major asset of the estate, the family home, would be

bequeathed to Phil for his efforts to support their mother. When it was declared null and void, Dan took this as an opportunity to pursue legal action to obtain half of the estate that he had formerly indicated should go in full to the caregiving brother. Phil concluded, "There is no fairness."

Can't Ask for More: Siblings in the Ellingham Family

The Ellingham family has seven siblings, all of whom lived between one and four hours' drive away from their mother. The mother had experienced a series of mini strokes but continued to live in her own home, with regular visits and help from three of the siblings. The other four siblings visited occasionally.

Barb, the caregiving sister who lived nearest her mother, offered to be interviewed during an interview with her husband Phil about his family's experience in caring for his mother. Barb's impromptu interview was treated as a bonus to this study, and no request was made of her to refer to her siblings.

Barb described the coordinated and careful efforts of herself and two of her sisters, Janet and Helen, with each doing different tasks so that their combined efforts supported their mother's well-being and independence. Barb discussed, for example, how she worked with Janet and Helen to promote adequate nutrition for their mother, and she remarked that all three of the sisters "did anything and everything to get her to eat."

As well as concerted attention to their mother's nutrition, the three sisters also monitored her medications and day-to-day finances. Barb included an example of how the sisters managed differences of opinions. Regarding the monitoring of finances, she noted, "My sister Janet said, 'Check in her purse as to how much money,' that she carries too much money. That's—no that's my mother. I will not do that to her!" Instead, Barb

carried on with her own way of monitoring while Janet monitored in the way that she thought best. The common goals and overall coordinated efforts among these sisters left them quietly working around their differences of opinion about day-to-day care.

Although the great majority of care needs were met by three of seven siblings, the participation levels of the less involved siblings were rationalized. Barb described one brother, Ted, as having reduced his level of involvement according to his personal circumstances. Another sister, Jean, whose participation was limited, was described as living at a distance. In characterizing Jean, Barb noted, "Jean wishes she could do more." The remaining two brothers in this family, Alan and Randy, had limited involvement in the caregiving. Barb explained this in terms of their difficulty in accepting the change in their mother that necessitated the care. Yet her explanation was offered tentatively and seemed subject to revision: "Alan and Randy didn't want to accept that fact; . . . that's what I hope." At the same time, Barb made a summary comment about the respective caregiving contributions of all of the siblings: "We're all doing the best we can. . . . You can't ask for more than that."

One Unit: Siblings in the Frank Family

In the Frank family there are three siblings. They were unified in their care for their mother, who had significant physical needs and lived in long term care. The unity of their caregiving efforts and approach to family in general was tied to a religious upbringing as immigrants to Canada in the 1950s. Their father in particular, the youngest in a European family of 22 children, lost many contacts with his family of origin when they came to Canada. As a group of five, the young family grew and remained very close: "We really stuck together as a little family."

Jim, the brother who lived at a distance, was interviewed while he was in town for their mother's surgery. His local brother, Warren, declined to be interviewed; and their local sister, Pam, agreed to be interviewed, but then was unable to commit the necessary time because she cared for two aging parents and her own children and worked full time.

Jim portrayed his sibling group as having very open relationships in general, which included a well-coordinated approach to their mother's care. For example, during their mother's transition to long-term care, all three siblings participated in moving and storing the contents of her house. The larger items were stored at the homes of Warren and Pam because they lived nearby, whereas Jim stored a more portable collection of family memorabilia.

In terms of ongoing care, Jim reported that Warren and Pam visited several times per week and regularly had their mother stay at their homes. Jim maintained phone contact several times per week and visited approximately monthly. Jim noted that sometimes he came to town on business and that he would not think of being in town and not seeing their mother. Further, he was hoping that her health would soon be stable enough to allow her to stay at his home to give his local siblings a break.

Although Warren and Pam did more of the face-to-face caregiving, Jim depicted his commitment to meeting the care needs of their mother as being equally strong. Jim described the family as having a practice of standing by one another and proclaimed the family to be "one unit."

Connected: Siblings in the Gordon Family

The Gordon family has four siblings with diverse lifestyles. The siblings did not consider themselves close, yet shared a connection aimed at meeting their mother's care

needs. One sister, Beth, had purchased a home with their mother and provided live-in care to her in that home for approximately 10 years. During this time their mother sustained two broken hips and required two amputations. Although her medical needs were high, Beth described her as easy to care for. The three other siblings, Carol, Gerry, and Pat, lived out of town but visited and helped regularly.

Beth and Carol were interviewed separately; Gerry and Pat declined to be interviewed. Beth and Carol described how diverse sibling styles of caregiving came together in this family, not by formal consensus, but by each doing what he or she thought necessary. It was Beth who had no family commitments to spouse and children and who had provided the live-in care. Gerry had assisted with maintenance of the home and provided ongoing socialization for their mother through regular visits. Pat visited regularly; her visits often included outings for shopping and appointments. Carol also visited regularly and was known for buying their mother extra things such as new bedding. Both Carol and Pat spent extra time with Beth and their mother whenever their mother had health problems.

Beth and Carol both described their mother as a spirited and generous woman. The sisters also characterized each other and their other siblings as generous, a quality that was linked to their upbringing as the family that owned the general store in a small town during the 1940s. Beth described the family store as "the focal point of the community"; Carol noted, "We always had something to give." At the same time, Beth and Carol qualified the family status in light of their father's alcohol addiction. Beth said, "But we were a mixed-up family because my dad had a problem with alcohol . . . and a

depressed mind." Carol noted, "We were the hub of the community. . . . On the downside, our father was an alcoholic."

Whatever the impact of their history with alcoholism, Beth's and Carol's descriptions revealed keen awareness of their differences in caregiving contributions and overall styles, yet a positive regard for what each had to offer. Beth described Carol as an excellent seamstress, painter, and calligrapher who was "thoughtful and caring and spent many hours with Mom." She characterized her brother Gerry as "a comedian. . . . He is generous and loves everybody." She portrayed her other sister Pat as an excellent cook and devoted grandmother.

Similarly, Carol spoke of her siblings variously as being lovely, generous, caring, and community focused. Positive perceptions of sibling involvement in caregiving prevailed in the accounts of both Beth and Carol. Carol concluded that Beth had "ended up with the heavier burden." At the same time, Carol saw caregiving as central to Beth's identity and noted that it had "become Beth's life and she's good at it, and she needs that kind of affirmation."

Although the two sisters made many positive comments about how caregiving needs were met, there were also discussions about differences of beliefs among the siblings. Carol described their mother's decision to purchase a house with Beth and live together so that their mother's needs would be met. Carol noted the siblings' general approval of the idea, yet this approval was colored by some hesitation from Pat. Carol captured this as she recalled her own advice to their mother: "'We're comfortable with it, Gerry is comfortable with it, and Pat can live with it, so just go with it.'" The description

of Pat as being able to "live with" the decision lacks the spirit of support for the decision that is evident in the description of the other siblings as being comfortable with it.

Carol also noted a perception of wariness among the siblings in relation to who received what from their mother. Carol recalled announcing to Beth that she had received a gift. Beth's immediate reply was, "What did Mom give you now?" The gift to which Carol had been referring had nothing to do with their mother, but rather was from her husband.

Some wariness among the siblings was related to discord that arose when Beth had, on behalf of their mother, disbursed the estate of an auntie in a fashion with which Pat had disagreed. Later Pat, who had been upset by the disbursement of her aunt's estate, became their mother's executor, a choice that Carol indicated was made because Pat was the one who was "more sensitive about these types of issues."

Differences in beliefs among siblings were part of a largely positive caregiving experience in this family. Yet these differences seemed pronounced in the sisters' closing commentaries about the effects of the caregiving experience of the sibling group; both Beth and Carol spoke in terms of a lack of closeness among that siblings. Carol said, "We're not really close. . . . The caregiving experience has helped to maintain connections, but it hasn't really made us very close." Beth commented similarly and added her sense of disappointment about sibling relationships: "I'm not happy we're not closer."

Two Camps: Siblings in the Henry Family

The Henry family has six siblings, all of whom were involved in the care of their mother. Two of the siblings had attempted to take lead roles in determining how care

needs would be met, but their ideas were in competition and resulted in a split in the sibling group that left two siblings pulling in one direction and four pulling in another.

Three of the six siblings lived approximately one hour's drive away from their mother, and the remaining three lived four or more hours away. Their mother had dementia but, with a variety of assistance from the siblings, had been able to remain in her home for four years following the death of her husband. She then moved to a supported living environment. Following the admission to supported living, all of the siblings visited with varying frequency.

One brother, Victor, was interviewed on the condition that his siblings not be interviewed. Given the discord surrounding caregiving issues, Victor expressed his wish not to risk provoking further complications. He indicated that he would find it meaningful to discuss his caregiving experience and that this might contribute to understanding issues that can arise when siblings share parent care. Victor was the only participant in this study to be interviewed twice. The second interview centered on his collection of written correspondence between himself and four of his five siblings as they attempted to reach agreement over how their mother's care needs should be met. These were mainly in the form of emails and a few letters, as well as a care plan developed by one of the siblings. Victor spoke from the perspective of their mother's power of attorney as he endeavored to work with his siblings to honor her wishes.

A major issue for the sibling group had been to determine where their mother should live. Their mother's need for a supported living setting had been agreed upon; however, the size and location of the setting were points of disagreement to such an extent that two siblings, Paula and Karen, relocated their mother without the knowledge

of two of the other siblings, Victor and Jack. Victor described his response to discovering that the move had taken place:

> Paula moved Mom out of her house and didn't tell me or Jack. . . . So Mom was there three days, and I went in after my sister took her there. And then this memo came out explaining it all. . . . So I went to see Mom there, and she told me she wanted to go home. And she said, "Well, you can give me a ride home." So her suitcase was there; we just packed it up and left.

The tug-of-war type of struggle that characterized the decision as to where their mother should live was also evident in other care decisions. Ensuring that their mother had adequate meals, for example, involved much debate and disagreement. Victor described preparing and packaging a daily meal for his mother that he delivered once or twice a week. He also made monitoring calls daily to ask his mother what she was having for dinner, thus ensuring that she was eating the meals. The resistance to this arrangement from Paula, who was allied with their sister Karen, was threefold. Initially, Paula contended that his meal provision was going against her belief that their mother needed "to learn to do things for herself." As their mother's dementia progressed and her need for care became more pronounced, Paula conceded that meal provision was appropriate, but told Victor, "Your meals are not nutritious." Finally, furthering her position that the meals were not nutritious, Paula set up a formal "Meals on Wheels" service despite the fact that Victor continued to provide meals.

Similar tension was revealed as Victor read email from Paula in which she expressed concern that their mother needed to move from her home because she was disoriented and resisted attending her day program. Victor countered that their mother's resistance was caused by her dislike of the day program that Paula had arranged for their mother to attend.

A further case of pulling in different directions was evident in relation to the timing of their mother's move from her own house to supported living. Paula's opinion was that the move should be immediate. She emailed her siblings, saying, "Mom is unable to help herself and desperately needs our help. . . . There is no time like the present. What are we waiting for?" Victor countered her call to action with his contention that the necessary steps for residential placement were being followed and that there was no need for dramatic action.

Victor's differences of opinion with one or both of his sisters seemed to result in disputes and opposing action being taken. Comparatively, a difference of opinion between Victor and Jack left them continuing to work together and share tasks. One of the brothers' disagreements was over whether or not to sell their mother's house. The house had been built by the now deceased father and had great emotional significance to their mother, who did not want it sold during her lifetime. Victor believed that her wish should be respected and the house kept, whereas Jack believed that taking care of the house created unnecessary work and that the house should be sold. Victor took the responsibility for checking the house twice per week. Jack, although he thought the house should be sold, helped with the upkeep by mowing the lawn during the summer. Although these two brothers had different opinions on this matter, they still coordinated their efforts and seemed united by a broader goal.

Perhaps the quiet cooperation between the brothers, even in the presence of a difference of opinion, was related to relationship solidarity that they may have felt with each other given the opposition presented by Paula and Karen. For example, Victor reported that his sisters had accused him and Jack, together with twin brothers who lived

at a greater distance, of conspiring to move their mother to a residential setting that was inconveniently located for Paula. Such accusations seemed reflective of both the distance between the brothers and the sisters and the solidarity within the brother pair and the sister pair. Further exemplifying this combination of distance and solidarity within this family, Victor described how Jack, who lived in the same community as Paula, went to great lengths to avoid her within the community because he did not wish to get into an extended discussion about care issues. In all, the siblings in this family were firmly divided into two camps, with differences of opinion pervading their caregiving experience. Victor concluded, "My sisters are the main problem in the family."

Sibling Comparisons and Evaluations of Equity

The sibling participants from these eight families compared and evaluated the fairness of their respective costs in the form of contributions to parent care and rewards in the form of entitlements to parent assets. Their comparisons revealed beliefs about what siblings should contribute, about the fairness of caregiving contributions and about how parent assets should be distributed. Each of these sets of beliefs had several subthemes:

"What siblings should contribute"

1. Doing whatever a family is supposed to do
2. No priority among siblings
3. Relevance of personal factors

"Comparisons of caregiving contributions and evaluations of fairness":

1. Doing enough
2. Working together
    a. planning together

b. dividing tasks

c. taking turns

3. Lightening the Load

a. giving breaks

b. making it easier

c. rounding out care

"How parent assets should be distributed":

1. Even shares

2. Deservingness

3. Following parents' wishes

In accordance with the participant recruitment sources for this study, it was expected that siblings from three of eight families would have experienced discord related to care and/or asset sharing. Instead, siblings from seven of the eight families discussed experiencing tensions related to sharing. Tensions reflect diverse beliefs within sibling groups and underline the value of including multiple perspectives from within families towards a fuller understanding of these issues. Thus it is important to consider the themes of the sibling perspectives that are presented below in light of the fact that in many cases, only one sibling perspective per family was obtained.

Beliefs About What Siblings Should Contribute

Doing Whatever a Family Is Supposed to Do

The theme of doing whatever a family is supposed to do emerged as the participants stated their belief that siblings, because of their position as adult children, had the responsibility to help and care for their parents. This theme was evident as they

expressed pride in having a history of helping their parents, which they viewed as having done the right thing. A belief in doing whatever a family is supposed to do was also noted as some participants articulated their disappointment in their siblings' lack of caregiving, which they interpreted as neglect of family responsibilities. Doing whatever a family is supposed to do was further defined in the belief that care and care decisions should be primarily in the hands of siblings rather than their spouses.

Grant encapsulated the idea of doing whatever a family is supposed to do when he said, "You feel, as a child, some responsibility to your parent. You want to do what you can." Phil discussed his history of caring for his mother that had begun 30 years earlier at the time of his father's death:

> And she was under my care from the time that my father died. We had a business at that time. I was forced to run it because of his death; Mother used to come in and be part of it.

Over the years his care for his mother had included shopping, helping with the upkeep of her home, and taking her for dinners and social outings. He characterized this care as "doing whatever a family is supposed to do." By contrast, he was critical of his brother Dan's failure to visit their mother and noted that Dan had said that "he doesn't have a mother."

Linda similarly depicted doing what a family is supposed to do when she described being part of an immigrant family in Canada in the 1950s. She pointed out that her family had experienced financial and health difficulties and that from a young age, she, as the older sister, "would be right in there, you know, helping my mother, supporting my father." In more recent years as her father's health deteriorated, Linda explained:

> I have to deal with it. No matter how difficult it is, no matter how draining it is on me, I have to deal with it, because that's been placed in front of me; and you know, this person, my father, he relied on me.

Linda expressed bitterness over her sister Joan's lack of caregiving and described Joan as "irresponsible; she's childlike." Linda added that as her father's dementia progressed and he required more extensive care, Joan "dumped" responsibility for him; "it was like as if she divorced him."

Further exemplifying the theme, Victor, who had visited and helped his mother regularly, described feeling offended because his sister Paula had told other family members that he was not doing anything for their mother. Belief in doing whatever a family is supposed to do was also manifest in Victor's family in the sharp distinction drawn between the roles of daughters and those of the daughters-in-law. Victor discussed Paula's belief that their sister-in-law, who had accompanied their mother to some medical assessments, had been overinvolved in his mother's care. At a family meeting Paula had become so agitated by her sister-in-law's participation and opinions that Paula struck her in the face.

Overall, the theme of doing whatever a family is supposed to do came through in the pride with which the siblings spoke of having contributed to meeting their parents' care needs as well as in the distress at being viewed otherwise. The theme was underlined by their use of strong language such as "forced," "dumped," and "divorced" to characterize the behavior of their siblings who did not do whatever a family is supposed to do.

No Priority Among Siblings

The idea of no priority was evident as the participants described themselves and their siblings as being equally affected by their parents' health needs. They also depicted themselves and their siblings as being equally influential in their parents' care and considered cases in which a sibling did not contribute to caregiving decisions as unacceptable.

Brian described how he and his sister were equally affected by their mother's many health problems: "Anne felt for Mom just like I felt for her." He summarized the impact of the care that he and his five siblings had provided to their mother and contended that the care given by the sibling group had enabled her to remain in her home and extended both the length and quality of her life. Brian concluded, "It wasn't one or the other; it was all of them." Brian conveyed resentment towards one sister, Bev, who had been the only one of the six siblings who did not honor their mother's wish to have the family together for special events. Brian gave the example of Bev's nonattendance at their parent's 50th wedding anniversary celebration, an event that five of the siblings had worked hard to plan. He commented, "I couldn't forgive Bev and her husband for not showing up for that 50th anniversary either. All the other people were asking; they know about it. Bev's the redhead, eh?"

Discussing their mother's care, Jim portrayed sibling relationships in his family in terms of no priority. Describing his connection to his brother Warren, he said, "Well, my brother—my brother and I are like twins." Regarding his sister Pam, he added, "And with my sister too. The only difference is that one's male and one's female [laughs]." Jim gave an example of this equivalence and noted that if an emergency arose in relation to their

mother, the long term care center would contact whichever sibling they could reach first: "There's no priority there."

In the Henry family Paula had attempted to assert the need for equal input into care decisions: she sent a group email to her siblings in which she expressed distress that her ideas for their mother's care were not being followed. She contended that Victor alone made the care decisions. From the group of six siblings, Paula singled Victor out in her correspondence, calling him "the one with the power" whose "opinion seems to be the only one that counts."

The siblings chose decisive phrases to capture ideas of equal importance, such as "wasn't one or the other" or "like twins." They described sibling behaviors, to the contrary, with perhaps even greater force in terms of not being able to forgive one's sibling or one's sibling having "all the power" or the "only [opinion] that counts."

Personal Factors That Influence Care Contributions

Although the participants believed that siblings should share parent care responsibility and they compared themselves on the basis of their equal potential to influence care and their equal right to have input into care, they did not expect that their contributions to parent care tasks would be equal. The sibling accounts revealed an array of personal factors believed to influence the type and amount of care contributed by siblings. The most common factors discussed were geographic proximity, financial resources, marital status, responsibility to one's own children, and employment commitments.

The siblings saw geographic proximity as a legitimate influence on how frequently visits to parents occurred. Barb explained that her sister Jean, who lived four

hours away, could not visit their mother as often as Jean would like. Beth called attention to her sister Carol, who often traveled three hours to help with their mother's care needs. Beth described Carol as generous and coming "all the way from . . . [location]" to help when their mother was ill. Claire and Anne were matter-of-fact in their description of Natalie's infrequent visits as a result of her living several hours away.

Offering a similar portrayal of the relevance of geographic proximity, Victor distinguished between the frequencies of his brother Jack's visits to their mother. He noted that now that Jack lived an hour away, he visited or took their mother for weekly outings. In contrast, "when he lived five minutes away, Jack used to pick her up all the time."

Financial resources were also viewed as an influence on the type and amount of care contributed. Claire and Anne reflected on their sister Natalie's infrequent visits and reported that Natalie "doesn't have much" in terms of money and possessions. Financial means also was evident in a comparison that Linda drew between herself and her sister Joan. Linda described her difficulty in having her father live with her in her small home: "And it was a very dysfunctional situation, him living with me, because our house is very small. My husband has his business down in the basement. . . . Joan lives in a very nice, large home."

Marital status and responsibility to one's own children were also used to justify different sibling contributions. In describing her own 10 years of live-in care to her mother, Beth pointed out that "I was the one who was single" and that her brother and sisters had commitments to their spouses, children, and grandchildren. Consideration of the age and care needs of siblings' children was viewed as important. In explaining her

undertaking to provide live-in care to her father, Linda compared herself to her sister Joan: "Joan's kids were much younger."

Employment factors were raised in the siblings' explanations of who contributed what to parent care. Phil indicated that his out-of-town employment commitments through the week necessitated weekend visits to his mother. Similarly, Barb mentioned that her sister Helen's visits to their mother occurred on weekends because of Helen's employment commitments.

Sibling Comparisons of Care Contributions and Evaluations of Equity

In discussing the fairness of caregiving among siblings, the participants compared and evaluated their respective contributions according to the extent of the tasks contributed and the level of coordination of tasks among the siblings. In some cases they perceived fairness when the sharing was relatively even and they each performed tasks that required comparable time, effort, and expense. In other cases the contributions were relatively uneven, yet well coordinated and regarded as fair. In describing the fairness of siblings' contributions, the participants spoke in terms of whether they and their siblings had contributed enough, worked together, and lightened each other's loads.

Doing Enough

In evaluating whether they or their siblings were doing enough, many used terms such as *least*, *few*, *much*, and *amount* in their descriptions.

Grant characterized the periodic letters written to their mother by his out-of-province brother as "the least he can do" towards her care. Jim, who lived out of town, compared his contributions to their mother's care with contributions of his siblings Pam

and Warren, both of whom lived near their mother: "I'm not satisfied with the amount of time I'm able to spend with her, because I live 200 miles away."

Brian described the limited involvement of his sister Bev in relation to their mother's care needs. He noted that Bev had done "a few things a few times." Claire, a live-in caregiving sister in her family, offered her opinion that Bev "had not had much at all to do with the caregiving of my mother, and I will never forgive her for it." She added, however, that Bev had spent long days at the hospital with their mother during the final weeks of her life. Claire's assessment of this involvement was, "I mean, it's a little late!"

Doing enough was an important consideration in Phil's report of his brother Dan's lack of involvement: "Dan seemed quite content to let me look after everything." Along the same lines, Linda criticized her sister Joan's lack of involvement in selling their parents' house: "I did all the work in doing all the real estate, and my sister just went off on a holiday."

This component of evaluating fairness stood out for the lasting impression that it had on siblings. Once an evaluation was made that one's sibling's contributions were not enough, this evaluation pervaded other discussions about that sibling.

Working Together

The siblings compared and evaluated their efforts in terms of how they were combined to meet parent care needs. The focus of working together was on the coordination of efforts with each sibling's contribution being made in light of the contributions of other siblings. Planning together for their parents' care as well as sharing in the performance of required care tasks were important. Sharing tasks consisted of dividing tasks among siblings or taking turns performing the same tasks.

Planning together. Care contributions were evaluated based on whether there was joint planning. Grant described discussing and planning their mother's care needs with his sister Katherine. He commented, "So I visit Tuesday, Thursday, Saturday; Katherine is Monday, Wednesday, Sunday." Grant explained that if an issue arose that needed to be addressed with the staff of their mother's long term care facility,

> normally I would phone Katherine, let her know what was happening, that I'm planning to follow it up. Or if it was somebody that she's established some contact with or had some good success with, she might be the person that would do it. If she's going away, if I'm going away, I mean, all of those factors would enter into it.

Carol observed that her sister Beth, who had provided live-in care to their mother, enabled coordinated planning by being "very good at keeping us informed." Similarly, Barb reported that she would "compare notes and ideas" with her sisters, Janet and Helen. Email facilitated this process: "I just email how I found her or what was going on. If it is something important, like when it was her glasses, I didn't know who her eye doctor was, so I phoned my sister Helen." Barb also illustrated how planning together allows siblings to avoid interfering with what their siblings are doing. She summarized her involvement in the care of their mother as being determined partly by her sisters' contributions. Barb's involvement was, in her words, "a comfortable place to do my thing with Mom one-on-one without interfering or stepping on toes."

Further examples of planning parent care were in the form of reports from brothers in both the Barclay and Frank families that vacations were scheduled so that the siblings were not away at the same time. Grant pointed out that he and Katherine "try to make a point of not being away for an extended period of time at the same time." Grant added that at one point "we purposely postponed our travel plans until Katherine had

returned." Jim noted that he and his sister Pam and brother Warren "work vacations so we're not away at the same time."

Lack of joint planning was evident in the Henry family, where the siblings disagreed over the most suitable residential option for their mother. Paula felt ill informed of the results of placement assessments that had been overseen by her brother Victor. At one point Paula chastised Victor, accusing, "You're supposed to share information." Following considerable debate among the six siblings in the Henry family, one brother, James, who lived at a distance, summarized his opinion of issues that influenced the decision about where their mother should live and sent it in a group email message to his siblings. In the process, James lamented that disagreements had occurred, yet endorsed the existence of ongoing communication and planning. James wrote, "Hello, everyone. Some nasty emails being sent. Nasty doesn't help anyone. The communication is better than none. I think it is in Mom's best interest—health, safety, companionship—to be living somewhere such as Facility X." His sister Paula, who had been disagreeing with Victor about where their mother should live, captured the importance of coordinated planning and decision making as she promptly responded to James through the group distribution: "James, I'm happy to know you're on the same page as me and Karen."

The siblings sometimes accused each other of practicing a "your-way-or-the-highway" style of caregiving. In the Baker family, Joan complained in a letter to her sister Linda, "Big sister spoke. . . . It was your way or the highway, right?" Similarly, Paula protested her brother Victor's role in decision making through a group email to all five of her siblings: "I guess when you have a dictator in the family, there isn't much anyone can do." In a subsequent email she criticized, "It seems that Victor is calling the

shots, and it's either his way or the highway." Sibling beliefs that there is an absence of planning together lead to negative evaluations of the fairness of caregiving.

Dividing tasks. One way to work together was to divide tasks so that no sibling was left performing all care tasks. In the Barclay family, for example, siblings Grant and Katherine, as well as visiting on alternate days, established that Katherine looked after clothing and dietary needs and that Grant was responsible for equipment needs and finances.

In the Ellingham family three siblings set up a routine in which one sister, Janet, visited regularly and did most of their mother's shopping with her, whereas another sister, Helen, spent nearly every weekend with their mother. During these weekend visits Helen accompanied their mother to medical appointments. A third sister, Barb, spent one day per week with their mother during which she monitored medications and groceries as well as took her to lunch and for other outings. Barb also made daily monitoring phone calls to their mother and made extra visits if, during the phone call, there was indication of a need for extra support.

Grant believed that his sister Katherine's living nearby made his own caregiving easier because he could be comfortable in the knowledge that there were two of them sharing their mother's care. He described feeling more obligations to visit more often when his sister was away and being glad when she returned: "I know she's glad when we come back from being away, and certainly I'm glad when she returns from a long trip." Grant added further support for this idea as he noted, "And my sister had her seven weeks overseas, and she felt bad; she felt bad leaving *me*."

A brother in the Henry family, Tom, who lived at a distance, detailed in a group email to his siblings the coordinated division of tasks as the sibling group grappled with choosing the best residential option for their mother:

> In general, Victor makes meals for her, Paula takes her out once a week, Jack does the odd chore, at times one of us takes her home for the weekend, etc. So if we all continue to do our bit, Mom can still live at home."

In contrast, Linda, who had provided live-in care to her father, described an absence of the division of care tasks with her sister Joan. Linda felt left alone to respond to frequent urgent calls when her father had made a brief return to living in his own home: "The person they call is me, you know? Because my sister has an answering machine on; she won't allow this kind of thing." She summarized: "Joan's protecting herself, okay? So somebody has to carry the thing; you know, one sibling protects herself, and the burden basically falls on the others, you know."

Taking turns. Taking turns in performing the same or similar tasks was another approach to working together. Dividing tasks meant siblings each contributed something different to care. In contrast, siblings who took turns were interchangeable in performing care tasks. Thus siblings' understanding of what was involved in each other's care tasks was particularly detailed.

Claire noted that her sister Anne had moved in during the last year of their mother's life and took turns with her in dressing their mother: "Anne and I both dressed her; we took different days and we dressed her." Jim discussed turn-taking as he pointed out that his brother and sister, who lived near their mother, alternated having her visit their homes for weekends: "Warren and Pam, they take turns so that she always has some activity. Like, one weekend at their place, the next weekend at their place." He added that

Warren and Pam also "take turns coming up during the week" to visit their mother at the care facility.

Grant illustrated the importance of turn-taking as he remarked that, initially following their mother's stroke and move to long term care, he and his sister Katherine both visited her daily. Grant found this phase of daily visiting to be demanding and noted that since this time, he and Katherine had "gotten into a pattern" of visiting on alternate days, which was much more manageable.

Working together was evident in sibling solidarity, a sense of working towards a common goal. When solidarity among the siblings was present, they seemed able to quietly work around disagreements. Such was the case when different opinions arose in the Ellingham family over monitoring their mother's day-to-day finances, but the sisters were able to carry on their coordinated monitoring efforts without dispute. Similarly, the Henry brothers disagreed about selling the family home, yet continued working together to maintain the home.

In contrast, a lack of caregiving solidarity had great impact on how the siblings viewed their overall sibling relationships. This was notable in the Cook family, for example, in which all three siblings interviewed spoke about their less-involved sister Bev in terms of lost sibling group connections. Brian said, "Bev just snubbed the whole works of us, eh?" Anne claimed, "Bev has nothing to do with any of us," and Claire summarized, "We don't know Bev."

Lightening the Load

The siblings evaluated caregiving contributions according to whether they lightened each other's caregiving load. Lightening the load often took the form of giving

siblings a break by filling in for them in the performance of care tasks. In other instances, lightening the load entailed doing things to make it easier for siblings to perform their caregiving tasks or making contributions that rounded out the care that the siblings were already providing by performing tasks that enriched this care.

Giving a break. Linda complained about the lack of a break and described the change to her life that her live-in caregiving entailed:

> He's right in my home, and he's larger than life. I mean, he'd totally taken over with his illness. . . . And I'm really sacrificing my family life and my serenity, my peace, my *job*. I can't work, you know; I need to be there to help the caregivers.

Given this impact on her life, she was not satisfied that her sister Joan's contributions constituted giving her a break:

> And so what Joan would do, she started this practice where she and her husband would take Dad once or twice a month on Sunday morning. They would take him to church, occasionally they would take him for lunch, and then they would drop him off at two o'clock in the afternoon, okay? And I basically got very tired of that. I said, "You know, if you're going to be taking him like this and breaking up my day, I mean, at least give me a Sunday. You know, keep him until later," you know? No, Joan didn't want to do that because her precious day, you know? So I just, you know, I would just run out and be able to enjoy a nice meal when I'd have to run back again because they're going to be dropping Dad off at two o'clock, you know. So there was absolutely no support. She was just taking him to church because I think that it calmed her guilt, you know, her guilt issues.

By contrast, Claire described her brother Brian as making frequent offers such as, "Call me if you need a break" and as being "more than willing to take Mom to her doctor's appointments." Claire also reported that Brian gave her a break during their mother's hospitalizations: "Whenever my mom went to the hospital, Brian was always there, and he would stay the majority of the day with my mom."

Similarly, Beth appreciated her sister Pat's sometimes coming into town to give her a break by taking their mother to medical appointments: "Pat took her to physio appointments that I couldn't take her to because I was working."

Making it easier. Making it easier involved assuming all or parts of tasks usually performed by a particular sibling or joining together with siblings for difficult tasks. Barb explained that she was the one among three caregiving sisters who regularly took their mother for a drive. This was a favorite outing for their mother, and Barb ensured that it was part of her routine that enabled her sister, Helen, who drove the farthest to see their mother, to visit without feeling obliged to spend more time in her vehicle. Barb also pointed out, "I phone her every day because for me it's not long distance." Thus monitoring was made easier and less expensive for Barb's sisters, who were released from the need to call their mother frequently.

Similarly, Beth's brother Gerry had made many repairs to the home that Beth shared with their mother. Beth appreciated this contribution to the comfort of the environment where she provided live-in care. Further, she expressed gratitude for her sister Carol's visits, which made her own caregiving easier, particularly the visits in response to a medical need that arose for their mother: "When Mom was in the hospital having the operation, Carol would just say, 'Can I come up this time for a week?' or something, and I said, 'Well, that'd be great.'" Beth's comment that it would be great to have Carol visit for the week seemed broad enough to encompass the benefits of both receiving help with meeting their mother's care needs and having her sister's companionship during their mother's hospital stay. Jim, the out-of-town brother in the Frank family, made both of these aspects of making it easier immediately evident as he

was interviewed for this study during a trip to support both his mother and his siblings during his mother's surgery.

In the Barclay family, Grant described receiving email from his brother John that often included a request for Grant to convey concern and affection to their mother on behalf of John and his wife. Grant eventually responded and asked instead that John email a longer and more descriptive letter to their mother that Grant could then read to her during visits. By writing these more detailed letters, John made Grant's frequent visits more diverse and thus easier.

Linda illustrated the importance of sibling efforts that made caregiving easier as she described her own experience to the contrary. She noted that during a demanding caregiving time, her sister Joan had forced her to also assume the trusteeship for her father:

> And Dad was a handful. I didn't have any caregivers at the time; I was unable to work; I was unable to move. Joan had dumped her trusteeship on me at that particular time, just gathered it all up in a big box and said, "Here, I don't want it any more. You take it," you know.

Joan countered her sister's complaints with protest of her own. She expressed a lack of support from Linda in making caregiving easier for Joan during the difficult time following their father's surgery. In a letter, Joan reminded Linda of the "time without end" that she had spent caring for their father after his surgery. Joan claimed that Linda had been present only for the actual surgery and then had made a quick exit, leaving the follow-up and accompanying "dirty work" for others. Joan demanded, "Where the hell were you after Dad's heart surgery, huh? Huh?"

Claire also illustrated the importance of sibling contributions that make caregiving easier when she claimed that contributions from Bev had served to make her own caregiving more difficult:

> Maybe every six months . . . they'd pop by for a coffee and they'd stay till five o'clock, six o'clock, and we're trying to get supper going. My mom's a diabetic, has to have food at certain intervals. And Rick and I would sit downstairs, and I was getting angry. Like, I would say, "You know, doesn't she realize what time it is? You know, and if she thinks I'm going to invite *her* for supper, she's *crazy*!"

The value of making caregiving easier was evident even in instances in which efforts were less than successful. Anne described having stayed with their mother while her sister Claire and brother-in-law Rick went on a holiday. Another sister, Natalie, who lived several hours away, had insisted on also coming to stay during Claire and Rick's vacation. However, the two substitute live-in caregiving sisters had different approaches to what needed to be done, and struggles arose regarding daily schedules such as what time to get up and go to bed and whether and how to drive to appointments. Anne remarked, "Natalie just aggravated the situation" and "I was just ready to throttle this woman!" Yet Anne went on in her description to express appreciation for Natalie's desire and attempt to help: "She's good hearted" and "Mom *loved* to see Natalie."

Similarly in this family, Claire noted that occasionally, when her brother Brian arrived for his daily visit, she would already have left to go grocery shopping, which left their mother alone for a short time. When Claire returned, Brian would express displeasure that their mother had been alone for any period of time. Claire considered his criticism inappropriate:

> Brian's got no right to say to us, you know, 'You have to be with Mom twenty-four hours a day.' If he wanted that, then he can pay to put Mom in a nursing

> home. He wasn't here twenty-four hours a day around the clock every day of the week!

Yet Claire went on to note that there were no grudges, that Brian was devoted to their mother's well-being, and that, in all, she "couldn't ask for a nicer brother."

Rounding out care. Rounding out care meant siblings' making different contributions, often social or financial, which served to "round out" parent care by adding something distinct from what already was being done.

Claire spoke of three of her siblings' contributions to their mother's care. She took pleasure in describing Brian's daily visits as a highlight for their mother that had provided the impetus for her to apply lipstick. Their mother had so valued this social component that Brian maintained contact with her by telephone when he was away on vacation. Claire also described the contributions of Natalie, who lived at a distance and managed only occasional visits, yet wrote letters and made phone calls to their mother: "She's a beautiful letter writer, . . . and they used to phone each other on the phone all the time, but Natalie still wrote her letters. I mean, Natalie's got a way about her." Claire went on to describe the contributions of Anne, who had moved in temporarily and, during her stay, did daily crossword puzzles with their mother. Claire pointed out that as the caregiving continued, she and her husband Rick would set her mother up in the kitchen , and then

> Anne would sit in the kitchen with her and do crosswords with her. And so that was company for her because we weren't a lot of company after a while because we started with a routine and we'd just—we'd just check on her.

Claire considered Brian's daily visits, Natalie's phone calls and letter writing, and Anne's crossword-puzzle companionship to be less encompassing than her own

caregiving. Yet she valued the contributions of each of her three siblings for enriching or rounding out the day-to-day care.

Brian softened his disapproval of Bev, who was not highly involved in their mother's care, by calling attention to how she had rounded out this care. Although Brian, like Claire, was critical of Bev's lack of involvement, his overall assessment of Bev was more favorable than Claire's evaluation was. Claire had concluded that she would never forgive Bev; Brian observed that Claire and Rick "just don't have any use for Bev at all. But," Brian countered, "she's not quite that bad." He quickly linked his more gentle assessment to his belief that Bev had gained important insight from their mother into the delicate issue of grave markers: "She drew a picture for Bev of the kind of marker she wanted," which they then ordered not only for their mother's grave, but also for the adjacent grave of their mother's deceased brother. Brian emphasized the significance of Bev's having gained this information when he claimed, "This is something Mom wanted for a long time." Although Brian did not agree with Bev's overall level of participation in their mother's care, he valued her having attended to something that otherwise might have been overlooked.

Brian also discussed the importance of another rounding-out contribution to his mother's care as he described her love for gardening and noted that his sister Anne had "helped Mom a lot with gardening."

Carol captured the idea of rounding out care and reported that, although her sister Beth had provided live-in care, some of Carol's contributions were in the form of redecorating their mother's bedroom or buying extra things for her. Beth described the welcome visits of Pat, another sister: "Pat came during the week to visit, just to visit for

tea." Beth also portrayed the rounding-out effect of Gerry's care contributions. Gerry saw their mother less frequently than his siblings did, and although his visits were most often purely social and did not entail providing meals or taking their mother to appointments, these social visits were greatly appreciated by their mother and valued by Beth.

Beth also called attention to Pat's contribution to their mother's post-retirement professional aspirations when she worked as the main employee in their mother's flower shop business: "Pat helped her a lot with her dream of having her own shop, and that was significant because Mom really liked flowers."

The theme of rounding out emerged in the siblings' descriptions of care contributions that added to care already in place, making it more complete. A tone of taking pleasure in this more complete care was apparent in the descriptions. For example, Beth, from the Gordon family, who had provided live-in care, was appreciative as she described the new flooring that her sister Carol had purchased for the care environment: "Carol bought this floor for us, this lino [pointing] in the kitchen, which was expensive at that time. It was very nice for her to do that for us." Claire, from the Cook family, who had provided live-in care, was comparably pleased with how the letters from her sister Natalie had enriched their mother's care-receiving experience: "And I'm telling you, my mom used to love getting a letter from her."

Brian, from the Cook family, offered an encompassing assessment of the significance of siblings' contributions being enough and their aim to work together and lighten the load as he summarized his disapproval of the limited involvement of Bev, who had not acted in accordance with these ideas, but rather had operated on her own schedule without regard for the needs of her siblings: "Bev does things on her own time,

period, not on other people's. . . . If it suited her to come in to visit, that's what she did; otherwise, no."

Sibling Beliefs About How Parent Assets Should be Distributed

Even Shares

In describing how parent assets should be distributed, some siblings spoke in terms of equal entitlements among siblings. Grant described meeting their mother's care needs in close partnership with his local sister, Katherine; whereas his brother John, who lived at a distance, was minimally involved in caregiving. Yet in discussing how assets should be distributed, Grant was clear that he did not "begrudge my brother, who doesn't do anything here, any less share of his mother's estate."

Brian described his mother's estate as having been divided evenly following her death. He noted that he had acted as executor and trustee and, as such, could have claimed a percentage of the estate for performing this role. Yet Brian chose not to retain a fee, preferring that each sibling receive an exactly equal share of the estate: "I could have asked for more, being a trustee. . . . You can legally do that, and I don't agree with that. . . . I mean, that wasn't for money." Even Linda in the Baker family, who believed that she had carried a far greater burden of caring for her father than her sister Joan had, felt that her father had loved both sisters equally and that they should share equally in his estate:

> You know, I had a choice, and it was my choice to make. Instead of dumping my dad off in a nursing home and just saying, "Forget about it. He's just old," I made the choice to take him into my home and care for him, feed him, protect him, try and bring him back to some health; I made that choice, you know. I could have not made that choice. And splitting the money half-half would have been fair. But because I made that choice—you know, my dad and my mother loved us both equally, you know, and they split the money half-half, and that's fair, you know.

> . . . You know, I'm not entitled to any more just because I made a different choice than my sister. Yes.

Deservingness

Contrastingly, some siblings described their belief that in exchange for providing more care, one sibling should receive a greater proportion of the parent estate. This idea was central to the experience of Phil, in the Draper family, who had provided virtually all of the care that his mother required. His only sibling, Dan, had acknowledged the unevenness of their respective care contributions and agreed that in exchange for all that Phil had done, he deserved to inherit the family home. When a technical error in the preparation of their mother's will resulted in the will being declared null and void, and Dan took legal action to obtain half of the estate, Phil was left feeling betrayed that the agreement between the siblings about his deservingness was not honored.

Beth, the live-in caregiving sister in the Gordon family, took pride in describing how she and her three siblings combined efforts to care for their mother. Beth's caregiving was lengthy and involved and, in exchange for this, she inherited their mother's house. Beth noted that in reaching the decision that she would receive the house, their mother had consulted with all of the siblings. Although Beth noted at one point that she was "thankful that they [her siblings] saw fit" that she should receive the house, at another point she offered a declaration of her own deservingness: "I have every right to be here after ten years of caregiving."

The theme of deservingness was evident in the Henry family as well. Victor had prepared and delivered a daily meal to his mother for several years, and he noted that his brother Jack had commented that he deserved to be compensated for the meal provision.

Victor agreed that he deserved compensation, but qualified that the impetus for that compensation "would have to come from them [his siblings]."

Following the Parents' Wishes

The final theme of beliefs about how parent assets should be distributed contrasted with the themes of even shares and deservingness and instead entailed siblings' not expressing a personal belief, but rather deferring to the wishes of their parent. Brian, for example, summarized, "As far as I'm concerned, it isn't fair or not fair or anything else; the only thing that mattered was what mom thought." Similarly, Barb relayed, "I don't know anything about the will." When asked about her expectations for the distribution of her mother's asset, Barb stated, "I have none. It's whatever Mom wants."

CHAPTER 6:

LEGAL CASE FINDINGS

The Legal Cases: A Profile

This chapter of findings from legal case data begins with a composite summary of sibling disputes depicted in the legal cases. This summary is followed by a presentation of themes evident in this data related to how siblings compare care contributions and asset entitlements and evaluate fairness based on these comparisons.

The families portrayed in the legal cases varied in size from two to nine siblings. The extent and duration of parent care that they provided ranged from overseeing paid caregivers from a distance for one year to providing live-in care for seven years. All of the legal cases portrayed sibling disputes over parent assets being used to compensate or reward caregiving. These disputes took three forms: (a) Siblings contested the legitimacy of provisions that were in place to compensate or reward other siblings for caregiving, (b) siblings made competing claims about parent intent to compensate or reward caregiving, and (c) one sibling pursued compensation for caregiving where no compensation had been provided for.

The parent estates under dispute ranged in value from under $70,000 to multimillion dollars. The interaction styles among the siblings portrayed in the legal cases varied widely; in some cases, the only indication of discord among the siblings was the legal dispute. Contrastingly, some cases profiled a lengthy history of sibling interactions characterized by an abundant verbal use of profanities or mailing each other photos where heads had been cut out or blacked out.

From the 10 cases, three themes of sibling beliefs that were also present in the interview data were evident. First, the belief in no priority among siblings in relation to parent care and parent assets was found. The siblings believed that they should all have equal power and opportunity to influence how care is given and assets distributed. Second, the theme of doing enough was evident in the siblings' assertion that another sibling should not receive parent assets for having given care because that care was not sufficient. The third theme, sharing, emerged in the siblings' claim that they, along with their siblings, had made contributions to care and thus had shared the care responsibility and should be compensated or rewarded by the estate for these efforts. Alternatively, siblings who had carried much of the care responsibility rewarded one or more of their siblings whom they evaluated as having shared the responsibility.

No Priority Among Siblings: Undue Influence as Assuming Higher Priority

Like the siblings who were interviewed, those portrayed in legal cases tended to believe that there should be no priority among them in terms of influencing how care is given and assets distributed. In the interviews some siblings described being equally eligible to respond to parent care needs and distressed over the unfairness of being left on their own to respond to parent care needs. Alternatively, siblings interviewed were distressed by other siblings having assumed higher priority in caregiving by making care decisions on their own. In the legal cases the principle of no priority was prominent when the siblings claimed that they had been prevented from influencing caregiving and asset distribution because other siblings had exercised undue influence over their parent in decisions pertaining to care and assets. Siblings who made undue-influence claims were seeking to correct an imbalance among the siblings by claiming that one had greater

influence or higher priority than others. Their claims included the complaint that their own interactions with their parent were restricted by the undue influence of another sibling.

In the case of *Shannon* v. *McCullough* (1997), three of five siblings, Danny, Noreen, and Barbara, claimed that another sibling, Suzanne, with the help of the fifth sibling, Ernest, exerted undue influence over their mother and her decisions on how to distribute her sizable estate. Danny, Noreen, and Barbara contested the legitimacy of their mother's having left a large portion of her estate to 2 of her 20 grandchildren. These two grandchildren were the children of Suzanne, who had lived with and cared for their mother for five years following her stroke; and Danny, Noreen, and Barbara claimed that Suzanne had exerted undue influence over their mother's decision to leave this portion of her estate to Suzanne's children. There was evidence in notes that their mother's lawyer kept of her wish to leave a large portion of her estate to Suzanne's children for "their constant devotion, attention, care and loving consideration of her during her lifetime" (¶ 27). However, the three siblings who contested the will submitted that Suzanne had such close contact with their mother, including acting as their mother's liaison, that she had created distance between their mother and the other three siblings and used her own close position with their mother to "isolate her, which is part of the process which allowed them to influence her decisions" (¶ 73).

In disputing the will, Danny, Noreen, and Barbara claimed not only that Suzanne had isolated their mother and influenced how the estate would be distributed, but also that Suzanne was allied with the eldest brother, Ernest. Ernest stated his views on the relationships between their mother and his siblings and noted that his mother "had a close

relationship with all of them, but a particularly good relationship with Suzanne" (*Shannon* v. *McCullough*, 1997, ¶ 4). Ernest was not part of the effort to change the estate distribution and, in describing the family, seemed comfortable that the relationship between their mother and one sibling was closer than between their mother and himself and his other siblings. Contrastingly, Danny, Noreen, and Barbara in their legal actions protested what they viewed as one sibling, with the help of another, having dominated decisions about the distribution of the estate. The judge in this case ruled that the mother's actions reflected her own wishes and were not a result of having been unduly influenced by her live-in caregiving daughter.

The belief in no priority among siblings was evident in the undue-influence claim of one brother in his quest for a greater portion of their mother's estate, depicted in the case of *Kaur Estate* v. *Bhandar* (1996). Their mother had executed a will stating that her youngest son, Sukdave, one of five siblings, was to receive her house "'in appreciation for his care for me and my deceased husband'" (¶ 9). Sukdave had lived with and helped his parents virtually all his life. When his father died many years earlier, Sukdave had continued to live with his mother and helped her with such things as collecting rents on revenue property. The eldest sibling, Ragbier, legally contested the will, claiming that Sukdave had exerted undue influence over their mother. The case contains descriptions of actions previously taken by Ragbier to counteract what he perceived as undue influence by Sukdave. Ragbier had tried to persuade two lawyers to change their mother's will "so that all the property would be placed in trust and the plaintiff (Ragbier) and the defendant (Sukdave) would be co-executors. If there were any disagreements between the co-executors, the plaintiff's (Ragbier's) decision would prevail" (¶ 11). An ironic twist is

evident in the older brother's attempt to correct what he presented as his younger brother's overinvolvement or higher priority in determining how their mother's estate would be distributed by legally shifting the "final word" on the estate distribution to himself. The judge disagreed with the oldest son that the youngest son had exerted undue influence over their mother and upheld their mother's decision to give her residence to her youngest son.

In the case of *Tracy* v. *Boles* (1996), two siblings, Katherine and Arthur, who lived at a distance from their mother, used the claim of undue influence to dispute the distribution of their father's estate. The large majority of their father's multiproperty estate was left to the local caregiving sister, Doris. Katherine and Arthur contended that Doris had exerted undue influence over their father in his decisions about his care and asset distribution. Upon her husband's retirement, Doris had moved from Ontario to Nova Scotia to be near her father. Doris lived next door to her father and provided approximately six years of care to him, including laundry, some meals, and transportation twice daily to visit his wife, Doris's mother, in long term care. Katherine and Arthur advanced claims that Doris had dominated their father and pointed out, for example, that while Doris lived in the apartment suite adjacent to the father's suite, she "had connected his doorbell to a bell in her suite" (¶ 46). Katherine also noted that Doris insisted on being present during Katherine's visits with their father.

Katherine and Arthur described what they considered a specific outcome of Doris's overinvolvement in their father's life as they pointed out that some of their father's property that each of them had received officially came from Doris rather than their father. During her caregiving, Doris had made plans with her father for him to join

her and her husband in moving from Nova Scotia to British Columbia. Planning for this move had involved her father's transferring his assets to her to be used for the relocation. However, Katherine and Arthur were surprised that the property they eventually received came under Doris' name. Further, Katherine and Arthur expressed distress at not having been told that the property was in Doris's name even though they had been together as a family at their mother's funeral one month after their father's property had been transferred to Doris. Underlining her claim that Doris had dominated their father, Katherine contended that their father had been ambivalent about Katherine's limited involvement in decisions. Katherine insisted that "her father did not provide an explanation to his loving older daughter about why he had conveyed the long time family home to his youngest child" (*Tracy* v. *Boles*, 1996, ¶ 64). According to Katherine, when she found out and questioned her father about the estate distribution, "his response was to lower his head and he was reluctant to discuss it" (¶ 63). The ruling from the judge did not support the claims of undue influence advanced by Katherine and Arthur, but rather upheld the father's decision to pass the majority of his estate to Doris.

In the case of the *Coughlan Estate* (2003), the two sisters involved in the dispute over the distribution of their father's estate each claimed that the other sister had exercised undue influence over their father's decisions. The sisters, Frances and Mary, had provided live-in care: Frances off and on for three years, and then Mary for six months. The father's estate was split between Mary and the third sibling, Bennet, an out-of-town brother who had moved frequently as part of a military career and had not been central to the caregiving. Mary, who received part of the estate, had provided live-in care for a shorter duration than Frances, who did not receive any of the estate. However, Mary

also had a 20-plus-year history of having her father stay with her for four months each winter when she lived in California. In the legal case, Mary supported the distribution of the estate against challenges from Frances.

Each sister portrayed the other as having a forceful or manipulative style. "Mary indicated Frances always had a hold on her father that no one could understand" (*Coughlan Estate*, 2003, ¶ 18). Mary claimed that Frances had tried to isolate and dominate their father when he had lived with Frances, including keeping him locked in his room and denying him access to his financial information. Mary's claim was supported by her brother's testimony that Frances was a "forceful" person: "Bennet says he tried to have a phone put in his father's room, but Frances wouldn't allow it" (¶ 36).

Frances countered with a portrayal of Mary as manipulative: "She says Mary could be coercive—Mary could get her father to do almost anything" (*Coughlan Estate*, 2003, ¶ 63). Frances further contended that Mary had withheld information from her. For example, Frances noted that Mary had at one point removed their father from his long-term care center without anyone's knowledge. Mary countered that removing him was what their father wanted; nonetheless, when Mary took him from the center, she told the staff at the center that she was merely taking him out for a drive. Frances maintained that she was left without an opportunity for input into decisions given that Mary had acted secretly. The judge in this case did not support Frances's claims, but instead upheld their father's wish to divide his estate between Mary and Bennett.

The theme of undue influence by siblings emerged in the case of *Morgan* v. *Lizotte* (2003) in which two sisters from a family of eight siblings disagreed over the distribution of their mother's estate. Both sisters had provided live-in care to their

mother, and the dispute arose over the estate's being left to one sister. The sister who first lived with and cared for their mother, Marylene, was given the mother's home, valued at $70,000, during her year of live-in caring. The sister who was second to provide live-in caregiving, Ella, objected to Marylene's receiving the property and claimed that Marylene had "taken advantage of her position of power and influence" (¶ 18). Ella protested the estate distribution partly on the basis that Marylene had withheld information from Ella and the rest of the siblings; Ella claimed that Marylene "did not reveal to her siblings that the property has been transferred to her nor did she reveal her mother's hospitalization" (¶ 41).

Ella was opposed to what she perceived as Marylene's overinfluence. Marylene's husband countered Ella's assertion with his claim that it was their mother's volition to keep her decisions from some of the siblings. He testified that their mother, identified in the case as *JM*, had

> told him and the defendant that she wanted to give the defendant the property. He said the conversation took place in May 1999, and JM made them promise that they would not tell anyone, that she did not want the defendant's siblings to know (¶ 104).

The judge upheld their mother's action of having given her property to Marylene.

Undue influence by siblings appeared in the case of *Simpson* v. *Simpson* (1997), which pertained to the maintenance agreement that was in place between the care-receiving mother and one son, Lloyd. The other three siblings, Alberta, Raymond, and Gordon, contested Lloyd's receipt of the family home in exchange for caring for their mother as outlined in the maintenance agreement. Their protest was based partly on their claims that Lloyd had exerted undue influence over their mother and that the maintenance agreement was not what their mother had wanted. The maintenance agreement stipulated

that Lloyd and his wife Marilyn were to assume ownership of his mother's home and that "the Son will pay to the Mother for her maintenance and support the sum of FOUR HUNDRED DOLLARS (400.00) per month" (¶ 21). Furthermore, "the home on the Lands contains a basement suite and the Son will provide this suite for the personal use of the Mother without any charge or compensation therefore payable by the Mother" (¶ 21).

In protesting the maintenance agreement, Gordon contended that their mother was unhappy living in the basement suite while Lloyd and Marilyn occupied the main floor of the home. "She said that she was upset about being moved into the downstairs suite" (*Simpson* v. *Simpson* 1997, ¶ 56). In advancing claims that their mother was not able to do what she wanted, Alberta, Raymond, and Gordon all charged that Lloyd had "tried to isolate [our] mother from the rest of the family" (¶ 17) and thus had prevented their involvement in how care was to be given and assets distributed. Alberta, Raymond, and Gordon submitted that their efforts to discuss the particulars of the maintenance agreement with their mother were impeded by her refusal to speak about the agreement when Lloyd or Marilyn was in the home. Alberta noted that she had asked their mother "what she was doing in the downstairs section of the house. Mrs. Simpson cried and pointed to the upstairs" (¶ 60). Gordon claimed, "My mother was quite apprehensive to talk about it; she was pointing up to the sundeck where Marilyn was hanging clothes, and she wouldn't discuss anything personal about the house" (¶ 186). The judge ruled that the mother had done as she wished in creating the maintenance agreement that entailed leaving her house to Lloyd.

Doing Enough

Siblings disputed the fairness of other siblings' receiving parent assets in exchange for care contributions in claiming that the sibling who was rewarded under the estate for the caregiving had not done enough to ensure that the parent received adequate care. In the case of the *Coughlan Estate* (2002), the legal proceedings centered around two of three siblings. One sister, Frances, disagreed with her sister Mary's receipt of her father's estate, valued at $160,000, in exchange for Mary's provision of two-and-one-half years of live-in care to their father. In challenging the disbursement of the estate, Frances noted that she had also provided live-in care for four years and, further, that the care that Mary had given had been insufficient. In court, Frances reported having visited their father while he was living with and being cared for by Mary. Frances described finding her father unkempt; she had

> found him in bed in an unclean state. It was early afternoon and he was unshaven and had been so for a while; his hair was long and unruly; he was quite groggy; she had to assist him to sit up in bed. . . . Coughlan said Mary would not take him to a doctor. He was very thin. Frances indicated her father couldn't stand up at that time. (¶ 46).

In the case of *Spinney* v. *Spinney Estate* (1995), three of nine siblings were involved in the legal dispute. A brother, Hudson, had provided live-in care to both parents, first their mother and then their father, for a total of three years and received his parents' estate, valued at $70,000, in exchange for his efforts. One sister, Elaine, and one brother, Robert, disputed Hudson's receiving the estate on the basis that they had not been provided for by the estate. Elaine and Robert supported their assertion that they should receive part of the estate by claiming that Hudson had not done enough in his care to their father. Specifically, Elaine "felt the house her father and brother lived in was not

clean and [she] described finding a dead rat" (¶ 10). In spite of Elaine and Robert's claims that the care that Hudson had provided was not adequate, the judge in this case upheld the father's decision to give his house to Hudson in exchange for the care that he had given.

The belief that siblings were not doing enough was also raised in the case of *Simpson* v. *Simpson* (1997), involving four siblings in which a maintenance agreement was in place between their mother and one brother, Lloyd. The maintenance agreement stated that in exchange for receiving the mother's home, Lloyd was to "maintain and support the Mother" (¶ 21). This care arrangement was carried out for approximately seven years. Upon the death of their mother, Lloyd's three siblings, Alberta, Raymond, and Gordon, disputed the maintenance agreement partly on the basis of their claim that Lloyd did not "provide for Mrs. Simpson's meals, housekeeping and personal hygiene" (¶ 5) as required under the agreement. Gordon described finding their mother "frail, emotional, and incontinent of urine. As well she had fallen and injured her shoulder. . . . In the refrigerator there was little but sour milk and moldy bread. There was no fruit or anything edible" (¶ 58). Gordon indicated that he had felt compelled to respond immediately by helping their mother to clean up as well as by purchasing groceries for her. Raymond also called attention to deficiencies in her care; he claimed that when he visited their mother, "Her hair was matted in dried blood and she was disoriented. . . . The suite was a mess with dirty dishes spread about" (¶ 65).

"Doing enough" was a point of contention among three siblings in the case of the *Pierce Estate* (2003), in which the mother and father died within one week of each other. Two sisters, Ellen and Cynthia, disputed their brother David's failure to deduct from his

share of the estate a $40,000 loan he had received from their father six months before their father's death. During his life their father had provided financial support to each of the three siblings; this included giving Cynthia an interest-free mortgage, paying off Ellen's student loans, and providing the loan for David to pay back taxes. David, who lived out of town, was their father's executor; in this capacity he had deducted the student loan repayment from Ellen's share of the estate, but did not reduce his own share of the estate by the amount of his loan. In explaining his entitlement to the estate, David noted his involvement in caregiving had included having made trips to do things on behalf of his parents. For example, David described having traveled to attend the funeral of his father's sister as well as to resolve some problems with homecare: "Dad was unable to go; I represented Dad and had to fire one home care worker" (¶ 26). Ellen, in objecting to David's not having deducted the loan from his share of the estate, suggested the inadequacy of David's occasional involvement when she highlighted the consistency of her own involvement in caregiving: Ellen "said her contribution to her parents care was that she was the one who was there and she stayed with them and oversaw the hiring of caregivers, etc." (¶ 52). The judge in this case ruled that the $40,000 loan to David would be treated as part of David's one-third share of the estate.

Sharing Care Tasks

The theme of sharing care tasks emerged as siblings disagreed with assets that were given to other siblings as compensation or reward for their caregiving. This protest was based on a sibling's claim of also having shared in caregiving tasks. The sister and brother in the case of *Ryan* v. *Delahaye Estate* (2003) disputed the parent estate that was allocated 80%-20% in favor of the brother. In the will their mother claimed that the

brother, Bernard, had "been of great assistance to me and to his father over the years and the distribution has been made in special recognition of that devotion" (¶ 1). In arguing against this distribution and in favor of an even sharing of the parent estate, the sister, Marcelle, highlighted her contributions to the parents' care as having been comparable to those of her brother. Both Bernard and Marcelle reported having performed care tasks that included personal care, meal provision, transportation, and help with farm chores. Bernard had helped his parents with the buying and selling of properties and compared to Marcelle, had lived closer to his parents and was more consistent in providing care. However, Marcelle's contributions included having lived with and cared for her aged grandmother, thus sparing her parents the trouble and expense of the grandmother's care. Claims of fairness of caregiving in relation to estate distribution in this case were based on the siblings' often having contributed differently, but, nonetheless, having shared in the overall caregiving. The judge agreed that the caregiving had been shared and ruled that the estate be divided evenly rather than 80% in favor of Bernard.

Sharing caregiving tasks was a prominent theme in the case of *McLear* v. *McLear Estate* (2000). In this family of four siblings, Marjorie, who resided close to their mother, had taken the responsibility for transporting her where she needed to go as well as arranging for her meals on weekends. Marjorie's care went on for 10 years. Two other sisters, Mary and Georgina, "were not heavily involved in their mother's care until the mother's health began to seriously decline in the year or so before her death" (¶ 9). During the final months of their mother's life, Mary and Georgina were each spending up to 40 hours per week with their mother. Completing the sibling complement was a brother, Keith, who described himself as "a prodigal son" (¶ 9). Keith lived 150 miles

away and saw their mother infrequently. Following their mother's death, Marjorie rewarded the siblings for their respective caregiving efforts. She retained, separate from the estate, a guaranteed investment certificate that was registered in the joint names of her mother and herself and which she claimed her mother had signed over to compensate her for ongoing care. She then gave one-quarter portions of the GIC to each of Mary and Georgina, which she described as "gifts from her to her sisters, which she felt they deserved because they had helped care for their mother during her final period of declining health" (¶ 24). A sense of the importance of Mary and Georgina's sharing in the care was pronounced when Marjorie described managing her own caregiving around her career as a "busy realtor." Yet Keith, who was involved in neither day-to-day nor end of life caregiving, received no share of this GIC. The judge in this case reversed Marjorie's decision to use the GIC to reward her sisters and ruled instead that the GIC be split evenly among the four siblings.

CHAPTER 7:

DISCUSSION

Family scholars entered the new millennium summoned toward an ever more inclusive conception of family studies. Researchers and educators were urged to craft their efforts to include families who fell outside "the dominant discourse on 'The Family'" (Allen, 2000, p. 900). This meant focusing on families who were culturally and structurally diverse, such as ethnic-minority, gay and lesbian, one-parent, step, and adopted families. Whereas an inclusive focus has inspired a better understanding of diverse and flexible families, some attention has been shifted away from conventional kinship. Johnson (2000) cautioned that kinship, including collateral ties with siblings, offers powerful markers of identification and thus ought not to be relegated to an inconsequential status (p. 625). The current findings inform approaches to family studies by illustrating the significance of collateral ties in marking the identities of siblings in relation to their aging parents. In this study, collateral ties, and the equivalence inherent in these, were shown to be central to sibling beliefs about what they should do for and receive from their aging parents and how the fairness of their contributions and entitlements is evaluated.

Genealogical Equivalence: Equally Impacted, Equal Opportunity for Influence

Genealogical equivalence was manifest in siblings' beliefs that there is no priority among siblings within families. Siblings are expected to be equally impacted by parent care needs as well as to have equal knowledge about the care situation and equal opportunity to have input into care decisions. Equivalence was also prevalent in

expectations for parent asset distribution as the siblings expressed beliefs that assets should be evenly split and were distressed over other siblings having had too great an influence in asset decisions. Alternatively, some siblings believed that those who provide more care should receive more assets as a means of correcting for a lack of equivalence in caregiving.

Beliefs in the importance of genealogical equivalence were clear as the siblings interviewed described the underinvolvement of other siblings in issues of parent care with anger and indignation, which suggested that a central tenant of siblinghood had been violated. In these examples, unevenness of sibling involvement was presented as unfair, and siblings were described as not having done enough. These findings are consistent with those of earlier studies that captured sibling distress over caregiving inequities because of uneven distributions of labor (Ingersoll-Dayton et al., 2003) and insufficient amounts of caregiving (Strawbridge & Wallhagen, 1991).

This study elaborates on the findings of beliefs about the sufficiency of contributions by illustrating another side of this issue of equivalence wherein siblings believed that other siblings had been overinvolved in parent care. Only a few studies have touched on equity problems that siblings identified as stemming from other siblings' overinvolvement or reluctance to give up control over caregiving by sharing care tasks and decisions (Merrill, 1997). In the current study, perceived inequity because of other siblings' dominating influence was prominent. Distressed siblings characterized the caregiving style of other siblings as "my way or the highway."

Further, in the legal cases, a less conventional source of family studies data, the siblings were notable for their contentions that other siblings had exerted undue influence

over parent care. In particular factors related to determining how care needs would be met were prominent in legal cases in which the siblings claimed a lack of planning together for parent care. In some cases a lack of planning together was presented as deliberate domination by one sibling who had prevented others from having input into parent-care plans. In other cases some siblings were passively involved in the lack of planning together because their parents had prevented input from other siblings. In either event, and consistent with sibling reports in interviews, when care arrangements were perceived as having been made exclusively between a parent and one or more particular siblings, other siblings were distressed.

Drawing on legal case data as well as interview data provided a fuller view of the importance of equivalence among siblings. Examples of sibling distress over other siblings' over involvement portrayed in legal case data were more concise and formal than examples presented in interviews. While in an interview, one sibling might describe another as the one who "called the shots", in legal data, such beliefs had been advanced in courtroom settings as one sibling being "coercive" or "manipulative" with the parent. Legal data illustrated that such perceived violations of sibling equivalence are at the root of relationship problems that result in legal action. Indeed, in looking across legal and interview sources, the most positive evaluations of fairness occurred among siblings who consider themselves equally influential in parent affairs to the extent that their efforts are virtually indistinguishable as evident in such comments as " it wasn't one or the other (sibling); it was all of them" or in an emergency, the long term care facility would call whichever sibling they could reach first. Contrastingly, dramatic legal claims of unfairness relate to situations where siblings acted as the sole influence in the parent's

affairs through actions such as removing a parent from long-term care without the knowledge of other siblings or failing to inform other siblings of a parent's hospitalization.

Fairness concerns stemming from the over involvement of some siblings evident in both legal and interview data raise questions about how prevalent this type of concern might be among sibling caregivers in general. Further, these findings elaborate the equity theory proposition that in relationships, balance is important and an underbenefited party feels resentful toward an overbenefited party. The current findings illustrate how the overbenefited may also feel resentful. Some siblings who were overbenefited through having performed less of the caregiving tasks, expressed resentment at being restricted in their opportunity for involvement

Not all evaluations of fairness were as straightforward as comparing the extent of involvement of each caregiver of equivalent position. Judgments of fairness based on the importance of genealogical equivalence also occurred in subtle ways. The siblings positively evaluated fairness when they regarded other siblings as having validated their caregiving efforts. Validation entailed shared perceptions of the nature of care. Given their equivalence, siblings have been upheld as having a common framework of history and values that may leave them "uniquely suited to validate each others perspectives" (Ross & Milgram, 1982, p. 233). Wolfson et al. (1993) captured ways that caregiving perspectives can be validated among siblings. If one sibling assumes caregiving tasks, others are excused from those particular tasks. Alternatively, if one sibling assumes caregiving tasks, others mobilize to also perform care tasks. The current study presents further examples of validation in the form of caregiving contributions, often relatively

small, offered in such a way as to provide recognition to siblings who do greater amounts of care. Such validation contributes to an overall assessment of the shared caregiving as fair.

Validation of Caregiving Efforts

Care contributions that entailed siblings' lightening the caregiving load for other siblings served as validation. This effect was achieved as they gave their siblings breaks from their regular care activities and thus validated care efforts as significant and warranting being given a break. Even the offer to give a break anytime was appreciated as validating. Alternatively, siblings validated each other's efforts by contributing to care in ways that made caregiving easier for other siblings. An array of thoughtful contributions related to doing tasks that would free a sibling from having to do them, being quick to respond when caregiving was particularly difficult for a sibling, or enhancing the sibling's caregiving environment served this purpose.

In further support of the importance of validation, a lack of validation was part of the distress for siblings who perceived themselves as unfairly burdened by their caregiving. Descriptions of care-recipient parents as "demanding" or "a handful" were offered in an exasperated tone suggesting that a sibling(s) did not fully appreciate these demands and provide support and assistance accordingly. The effect of validation on assessments of fairness was pronounced, for example, in contrasting situations in which two apparently similarly intended contributions could be evaluated as either supportive or inadequate. One sister's routine of picking up her father from her sister's home and taking him to church and for lunch was viewed by her live-in caregiving sister as token and of no support given the strain that the live-in sister experienced. Yet in another

family, one sister's habit of coming weekly to have tea with their mother was greatly appreciated by the live-in sister, who viewed her sister's visit as valuable companionship for their mother while she herself was at work. In the family in which the social contribution of the sibling was appreciated, the sharing of caregiving was regarded as fair, whereas in the family in which the social outing was seen as unsupportive, the sharing of caregiving was viewed as unfair. Part of the difference between these two assessments of care contributions and overall fairness appears to be whether or not one sibling's care contribution was made in a way that left the other sibling feeling validated in her own caregiving efforts.

A further variety of validating caregiving perspectives occurred when sibling efforts had the effect of rounding out the caregiving efforts of other siblings by adding something distinct from what was being done. The siblings described these contributions from other siblings with pleasure as having made the overall care experience more complete.

Matthews and Rosner (1988) noted that in families with more than two siblings, even when two siblings assume routine responsibility for routine care, most others also participate "regularly, if only peripherally, in significant ways" (p. 193). The current findings expand knowledge of the ways that peripheral contributions can be significant. If contributions had the effect of lightening the load or rounding out care and validating siblings' caregiving efforts in the process, an overall positive evaluation of the fairness of caregiving was made.

Where siblings felt validated by other siblings, positive assessments of the fairness of shared caregiving were made even in cases where disagreements about day-to-

day care had occurred. For example, although the siblings disagreed over whether to keep their parent's house, check their parent's purse, or leave their parent unsupervised for short periods of time, they offered summary comments that attested to their appreciation for each other and the fairness of their combined caregiving efforts. The two siblings who disagreed about leaving their parent alone for a short period of time still expressed appreciation for each other's support in their respective care efforts yet both felt resentment towards a third sibling who visited on "her own schedule" without regard for how her visits might support or impede the efforts of other siblings.

The findings on the importance of care contributions being offered in a way that validates the contributions of siblings takes strides towards the goal of expanding the understanding of fairness among caregiving siblings that was described at the outset of this study. An initial part of this goal was to learn about values assigned to various types of caregiving contributions. Clearly, the assignment of value to caregiving contributions is less about *what* the contribution entails and more about *how* the contribution is made, as indicated in the example in which two very similar types of contributions were valued very differently. Further related to valuing caregiving contributions according to type, the example in which the weekly social visit was valued by the round-the-clock caregiving sibling demonstrates how important relatively small contributions can be to overall assessments of fairness.

A few researchers have alluded to the importance of validation. Bourgeois, Beach, Schulz, and Burgio (1996), in their study of disagreements among caregivers, spoke in terms of primary and secondary caregiving roles and pointed out that although the primary caregiver carries the majority of the burden of caregiving tasks, the secondary

caregiver provides important support to the primary caregiver, in part by having a shared history and an intimate understanding of the care recipient. This idea applies particularly well to caregiver siblings who share an upbringing with the care-recipient parent and may use their intimate understanding to support each other's efforts to provide care for their parent. A further reference to ideas of validation was offered in Brody's (1990) description of some siblings' claims of having made contributions that were not appreciated by other siblings. Together with the current findings, these earlier findings might be considered from an exchange theory framework to suggest that sibling validation is a form of caregiving reward.

This study represents a departure from research tradition in that it did not focus on the amounts of caregiving or personal factors that influence caregiving, particularly gender. Yet issues from these previous lines of investigation have been encompassed in the current findings. These issues were considered within a framework of caregiving as a group, rather than an individual, experience. By focusing on caregiving groups, including conflicts that occur within groups, standards for evaluating fairness in addition to "amount of care given" were revealed. These standards of evaluation were related to lesser-known aspects of caregiving rewards specific to groups and sharing in the form of a sense of being validated for one's efforts.

Implications for Future Work

The insights into evaluations of fairness generated through this study call for continued investigation into other aspects of caregiving-sibling relationships that might constitute validation and be important to perceptions of fairness.

Future work should also be aimed at expanding understandings of the largely unstudied phenomenon of overinvolvement in parent care. A potential research question might be aimed at learning about experiences siblings have had with feeling overlooked or excluded in caregiving and caregiving decisions because of the caregiving and decision making practices of other siblings. Illuminating the fairness implications of feeling overlooked or excluded may add to understandings of the theoretical concept of overbenefitting. Siblings who are overlooked or excluded in caregiving are overbenefitting in that they are left doing less than their "share" of care tasks, yet instead of feeling guilty, as would be expected given our traditional understanding of overbenefitting, siblings feel resentful at being manipulated out of providing care. In particular, continued study of legal case data holds promise to illuminate equity problems that arise if some siblings feel manipulated out of caregiving. Such perspectives elaborate our understandings of equity problems as most often arising because of some siblings shirking responsibility. Concerns with the overinvolvement of some siblings might also be used to challenge predominant images of caregiving as burdensome and costly and instead, portray caregiving as something desirable.

Additionally, Ingersoll-Dayton et al. (2003) contended that efforts to understand equity among caregiving siblings should include "examining varying perceptions of equity among siblings within the same network" (p. 211). Although the current work took a step in this direction, not all sibling perspectives were represented in either the legal cases or the interviews. However, the legal-case component of the data provided opposing sibling viewpoints within families and thus allowed a partial addressing of recommendations for encompassing varying perspectives. By comparison, in the sibling-

interview component of this study, in some families in which the siblings had strongly opposing perspectives, "both sides" of the issue were not collected because of troubled sibling relationships. Siblings were sometimes estranged, or one would either refuse to participate if another was participating or agree to participate only on the condition that the other(s) not be contacted. Interviews with more siblings within families may be obtainable through a design targeting siblings who have differing opinions yet where conflict between them is not well-established.

Two interviews conducted for this study presented an alternative source of access to strongly opposing sibling perspectives within families. In these interviews, the missing "side of the story" was included to some extent when the siblings being interviewed read written correspondence between themselves and their opposing sibling(s). Although this approach privileges the interviewed sibling, who has control over what written correspondence to share, it also includes at least a partial perspective of one or more other siblings in the troubled relationship and thus incorporates diverse perspectives. Additionally, written correspondence provides access to earlier stages of the issues being examined. Studies designed to require that sibling participants have maintained and are willing to share records of written correspondence related to opposing sibling views of parent care would likely continue to advance efforts to include varying sibling perceptions of equity including perspectives of how views of equity had developed.

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APPENDIX A:

CALL FOR PARTICIPANTS

Appendix A: Call for Participants

RESEARCH PARTICIPANTS NEEDED
For a study about fairness among sisters and brothers sharing in giving parent care and receiving parent assets.

Participants will be asked to take part in a private interview to discuss beliefs about what is fair to siblings sharing in giving parent care and receiving parent assets.

Study participants must:

- **be from families where there is/was a connection between giving parent care and receiving parents assets**
- **have one or more siblings also willing to participate**
- **be of European descent**
- **sibling participants from within families must share 2 biological parents**

Take One: (Leaflet attached to Posters)

Research Project

"Fairness among sisters and brothers sharing in giving parent care and receiving parent assets"

I'm doing a research project as part of my PhD. in Family Studies in the Department of Human Ecology at the University of Alberta. My project is about caregiving for aging parents. I'm interested in how brothers and sisters try to work out the sharing of giving parent care and receiving parent assets. In particular, I'd like to learn what brothers and sisters think is fair in their sharing.

I am looking for people who are interested and willing to participate in a private interview with me. In order to take part, people must be brothers or sisters from families where there is or was a connection between giving any kind of parent care and receiving any particular parent property, possession or money in return.

The interview would not be very formal, but more like a conversation. I would ask you questions about how giving care and receiving assets worked in your family and what you believe is fair when it comes to brothers and sisters sharing giving care and receiving assets.

In my project, I am trying to understand caregiving families. Therefore, it is important that I hear from at least two brothers and/or sisters in each family. Participants then, must have at least one sister or brother who would be willing to be interviewed. Given the scope of my project, it is also necessary that siblings from each family share two biological parents as I am limiting this work to fairness among biological siblings. Further, this is a small project and at this point I am not examining cultural diversity. Therefore, the participants I am seeking are of European descent.

It is my hope that the information I gather will add understandings that can help professionals be supportive in their work with caregiving families. Your interest in this project is very much appreciated. Please contact me if you have questions or would like to participate.

Bonnie Lashewicz
PhD Candidate
University of Alberta
436-4513

APPENDIX B:

ORAL REQUEST FOR PARTICIPATION

Appendix B: Oral Request for Participation

I'm doing a research project as part of my PhD. in Family Studies in the Department of Human Ecology at the University of Alberta. My project is about caregiving for aging parents. I'm interested in how brothers and sisters try to work out the sharing of giving parent care and receiving parent assets. In particular, I'd like to learn what brothers and sisters think is fair in their sharing.

I'd like to talk to you because you've been part of a situation involving sharing parent care and parent assets (for legal sources add: where not everyone was happy with the arrangement). I am wondering if you might be interested and willing to participate in a private interview with me. The interview would not be very formal, but more like a conversation. I would ask you questions about how giving care and receiving assets worked in your family and what you believe is fair when it comes to brothers and sisters sharing giving care and receiving assets. Would you be interested and able to participate?

In my project, I am trying to understand caregiving families. Therefore, it is important that I hear from at least two brothers and/or sisters in each family. Given the scope of my project, it is also necessary that siblings from each family share two biological parents. I am examining fairness among siblings and at this point, I am limiting my work to biological siblings.

I have an information sheet and informed consent form that give further details about my project. I will send these to you in the next couple of days. In the meantime, you can call me with any questions or concerns. I will contact you to schedule the interview once I have obtained an agreement to participate from your sister/brother.

It is my hope that the information you provide will add understandings that can help professionals to be supportive in their work with caregiving families. Your participation is greatly appreciated.

APPENDIX C:

INFORMATION SHEET

Appendix C: Information Sheet

"Examining Siblings' Beliefs About Sharing in Giving Parent Care and Receiving Parent Assets"

Purpose:
Caring for an older parent can be demanding and often involves brothers and sisters in different ways. I would like to learn more about what happens among brothers and sisters when they try work out the sharing of giving parent care and receiving parent assets. In particular, I am interested to know what brothers and sisters think is fair in this sharing. I would like to talk to you because you've been part of a situation involving sharing parent care and parent assets (for siblings recruited through legal sources add: "where not everyone was happy with the arrangement"). I hope that information you can provide will add understandings that can help professionals to be supportive in their work with caregiving families.

Method:
I am asking you to participate in a ninety-minute, private interview. The interview will not be very formal or structured, but will be more like a conversation. I will ask you questions about your beliefs about what is fair when it comes to brothers and sisters sharing giving parent care and receiving parent assets. The interview will be tape-recorded and later, typed out. I may request a brief follow-up interview if I have further questions.

Confidentiality:
I recognize that giving care and receiving assets can raise emotional issues. I will not disclose any contents of what you tell me to anyone else. In particular, no one else in your family will know anything about what you say to me.

No names will be used in the research report, but it is possible that select quotes from what you say will be included. I am not interviewing many people for this study and having a small number of interviews makes people easier to identify in the report. I will do everything I can to protect your privacy by changing particulars of your information. However, I cannot guarantee anonymity. Even when details are changed, your sibling(s)in particular, who is/are also part of this study, may be able to identify you.

The tape-recorded and typed out copies of the interview will be stored in a locked cabinet that is only accessible by the researcher.

Benefits/Risks:
Participation in the interview will take up some of your time and energy and will not offer direct benefit to you. However, I hope that the information you provide will help professionals in their work with caregiving families. There is a risk that your brother/sister will read my publications and recognize your information. You are free to decline to answer any or all questions or withdraw from the interview at any point.

Use of Information:
The information collected during the interview will be for my use toward completion of my dissertation about fairness among siblings giving parent care and receiving parent assets. My dissertation supervisory committee may listen to the tapes and read the typed out interviews to help me with my analysis. The interview data also has potential to be included in future research, publications and presentations.

Informed Consent:
If you agree to participate in the interview, you will be asked to sign a consent form before the interview begins. You will be given a copy of the form to keep for future reference.

Contact Information:
Questions about this study may be directed to:

Bonnie Lashewicz
Ph D. Candidate
Department of Human Ecology
University of Alberta
(780) 436-4513

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APPENDIX D:

CONSENT FORM

Appendix D: Consent Form

"Examining Siblings' Beliefs About Sharing in Giving Parent Care and Receiving Parent Assets"

Investigator: Bonnie Lashewicz, PhD. Candidate, Department of Human Ecology
Phone (780) 436-4513

Consent: Please circle your answers:

Do you understand that you have been asked to be in a research study?	Yes	No
Have you received and read a copy of the attached information sheet?	Yes	No
Do you understand the benefits and risks involved in taking part in this research study?	Yes	No
Have you had an opportunity to ask questions and discuss this study?	Yes	No
Do you understand that you can quit taking part in this study at any time?	Yes	No
Are you satisfied with how information will be kept confidential?	Yes	No
Do you understand who will be able to see or hear what you said?	Yes	No
Do you agree that information provided by participants may not be used in litigation, present or future?	Yes	No
Do you agree to the information that you provide being included in future research, publications and presentations?	Yes	No
Do you agree to be audio taped during the interview?	Yes	No
Do you agree to be contacted in the future by the researcher should additional questions arise related to your interview?	Yes	No
Do you agree to be contacted in the future by the researcher regarding continued research into fairness in caregiving families?	Yes	No

I agree to take part in this study.

_____	_____	_____
Participant Signature	Date	Witness
_____		_____
Printed Name		Printed Name

APPENDIX E:

INTERVIEW GUIDE

Appendix E: Interview Guide

August, 2004

Background: number of children, gender, birth order, geographic location

1. Tell me about caring for your parent.

   health status, progression, meeting care needs

2. How are/were your sisters and brothers involved? How was it decided who would do what?

   How explicit were decision/plans?

   What happens in emergencies?

   What happens if one sibling is away?

3. Tell me about how your parent's assets are/were to be distributed among you and your sisters and brothers. How was this decided?

4. Was/is there a connection between giving care and receiving assets? How did this work? How openly is/was this known within your family?

5. What are your views about the fairness of how caregiving and assets were shared among you and your brothers and sisters?

6. How has your experience with giving care (and receiving assets) impacted your relationships with your siblings?

7. Is there anything else you would like to add?

APPENDIX F:

SUMMARY OF INTERVIEWS

Appendix F: Summary of Interviews

Family name	Number/gender of siblings	Siblings interviewed, duration/location
Barclay	2 brothers, 1 sister	75 minute interview with 1 brother at a coffee shop
Baker	2 sisters	2.5 hour interview with one sister at her place of employment
Cook	4 sisters, 2 brothers	2 hour interview with 2 sisters and 1 brother-in-law at their home, 1.5 hour interview with 1 brother at his home
Draper	2 brothers	70 minute interview with 1 brother and sister-in-law at their home
Ellingham	3 sisters, 4 brothers	50 minute interview with 1 sister and brother-in-law at their home who were previously interviewed as a brother and sister-in law in the Draper family
Frank	2 brothers, 1 sister	45 minute interview with one brother at the hospital where the care recipient mother had just undergone surgery
Gordon	3 sisters, 1 brother	2 hour interview with 1 sister at her home, 80 minute interview with 1 sister at her home
Henry	4 brothers, 2 sisters	2.25 hour interview with 1 brother at the researcher's home followed by a 2.25 hour second interview with this brother also at the researchers home. The second interview was to allow sharing of written correspondence among siblings.